Gateway User Guide

Sales Disclosure Form ("SDF")

December 4, 2018

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Section 1: Getting Started

To access the Gateway SDF, type *http://gatewaysdf.ifionline.org* into the browser.

Users will be directed to the main Gateway SDF homepage. Here, returning users and new users can login or create a Gateway SDF account.

New users need to create a Gateway SDF account. To create an account, click "New Users." Users that already have an account can simply click "Returning Users."

Welcome to the Sales Disclosure Application

New Users
Get started by creating a Gateway SDF account.

Returning Users
Already have an account? Login.

Assessor Tools
Access the Assessor Edit Tools.

Gateway SDF User Guide
Learn how to get started and navigate through Gateway SDF.

FAQ
Frequently asked questions regarding the sales disclosure form.

Search Database
Search the state's sales disclosure database.

Find How to File
Counties in Indiana choose the method of filing
County: --Select One--

Gateway SDF Video Tutorial
Learn how to enter a sales disclosure form in Gateway SDF.

Find PDF
Search by SDF ID to view a PDF copy of a sale disclosure form.

The Indiana Gateway for Government Units provides a central portal for local governments to submit forms to the Indiana Department of Local Government Finance and the State Board of Accounts. It is maintained by the Indiana Business Research Center as part of the Information for Indiana Initiative.

Email
• DLGF
(GatewaySDF@dlgf.in.gov)

POWERED BY
Information for Indiana

New Users

New users will be directed to the "Sign Up for a New Account" screen to create an account. All fields must be entered in order to create a user account. When users create an account, they need to request a role (see next page for role explanations and request instructions).

A role is requested by checking a box above the "First Name" field. This request will be sent to the Department where your role will be approved. After all the account information has been entered and confirmed and a role has been selected, click on "Create User".

Login | **Create User** | Main | FAQ | Password Recovery

Sign Up for a New Account

☐ I work in the County Assessor's Office requesting upload capability
☐ I work at a Title Company requesting upload capability.

First Name:	
Last Name:	
Email:	
Confirm Email:	
Password:	
Confirm Password:	

Create User

Who Uses What Role? How Do You Request the Role?

Role A: Single Form Entry

Who: Counties that use the state-provided sales disclosure system instead of a software vendor system will utilize Gateway SDF's single form entry.

How: When creating an account for the single form entry, users will need to enter an email and password and reenter the same information in the "confirm" fields but will <u>not</u> need to check one of the boxes above the First Name field.

Sign Up for a New Account

☐ I work in the County Assessor's Office requesting upload capability
☐ I work at a Title Company requesting upload capability.

First Name:	John
Last Name:	Smith
Email:	jsmith@in.gov
Confirm Email:	jsmith@in.gov
Password:	●●●●
Confirm Password:	●●●●

Additionally, for those assessors who have an account to access the assessor edit tool, the current username and password have already been imported in Gateway SDF. Therefore, these users can use this username and do not need to create a new username.

Role B: Vendor Counties File Upload

Who: Counties using a vendor's software to handle their sales disclosure data processing will utilize Gateway SDF's file upload for vendor counties.

How: When creating an account for the vendor county file upload, users will need to request the upload functionality. The upload functionality is not granted for users automatically and must be requested and approved. The upload functionality for vendor counties is requested by checking the box next to "I work in the County Assessor's Office requesting upload capability", as pictured below.

Sign Up for a New Account

☑ I work in the County Assessor's Office requesting upload capability ⬅

☐ I work at a Title Company requesting upload capability.

Title: Assessor

County: Adams ▼

First Name: John

Last Name: Smith

Email: jsmith@in.gov

Confirm Email: jsmith@in.gov

Password: ●●●●

Confirm Password: ●●●●

Role C: Title Companies File Upload

Who: Title companies and other mass users in counties that use Gateway SDF's single form entry may choose to utilize Gateway SDF's file upload for title companies.

How: When creating an account for the title company file upload, users who desire this access will need to request the upload functionality. The upload functionality for title companies is requested by checking the box next to "I work at a Title Company requesting upload capability", as pictured below.

Sign Up for a New Account

☐ I work in the County Assessor's Office requesting upload capability
☑ I work at a Title Company requesting upload capability.

Title: [   ]

County: [Marion ▼]

First Name: John

Last Name: Smith

Email: jsmith@in.gov

Confirm Email: jsmith@in.gov

Password: ●●●●

Confirm Password: ●●●●

Returning Users

After clicking the "Log In" button, users will be directed to a page where they will enter in their email address and password.

User cannot remember password: If at any point, a user does not remember their password, they can click on the "Password Recovery" tab or the "Can't access your account?" link to retrieve their password. The user will be redirected to a page where they will enter their Gateway SDF account email address in order to retrieve their password.

If a user enters in an email address that is not tied to a Gateway SDF account, they will receive the following warning: *"We are unable to process your request. Please correct username or try again later".*

User does not know account email address: If at any given point in time, a user forgets their Gateway SDF account email address, they will need to email the Department at GatewaySDF@dlgf.in.gov.

The user should specify the issue in the email along with their first and last name. The Department will use this information and work with the user to help retrieve their Gateway SDF account email address.

User did not specify correct role: If a user has a Gateway SDF account and did not specify a role or the user specified the wrong role, they will need to email the Department at GatewaySDF@dlgf.in.gov.

The user should specify the issue in the email along with their Gateway SDF account email address, and the Department will work with the user to assign them their correct role.

Other login issues: If a user experiences any other issues with logging into Gateway SDF, please contact the Department at GatewaySDF@dlgf.in.gov.

Section 2: Role A - Single Form Entry

Beginning New SDF

To begin a new Sale Disclosure Form (SDF) click on the "Begin a new SDF" link under the "Main" tab.

After clicking on the link, notice there is a new tab titled "SDF Forms". Here, the user is prompted to choose a location of the sale (county in which the sale took place) and the year of the transaction from the drop down menus. Once a selection has been made, click the "Create SDF ID and start form" button.

Navigation in Gateway SDF: The SDF is broken out by section. Each section of the form will appear on its own screen. Users can navigate to any section of the SDF at any point in time by clicking on the section links to the right or by using the green arrows located at the bottom of the section.

Saving data in Gateway SDF: Entered data is not saved automatically and must be saved at the end of each section. Once all the information has been entered in a section, users must click on the "Submit" or "Save" button to save the information for that section. If a user tries to navigate to a different section of the SDF without saving, they will receive the following message: *"Are you sure you want to leave without saving changes?"*

Logout | Main | **SDF Form** |Change Password | FAQ

PART 1 - To be completed by BUYER/GRANTEE and SELLER

Table A. PROPERTY TRANSFERRED - MUST BE CONVEYED ON A SINGLE CONVEYANCE DOCUMENT

Property Number	Property Address	Billing Address	Parcel Type
Empty	Empty	Empty	Empty

Multiple parcels may listed on one SDF if they are contiguous and are within the same taxing district.

Submit | Cancel
* Required Field

Table A: Property Transferred

The "Create SDF ID and start form" button redirects users to "Table A. Property Transferred".

To begin data entry on the SDF, click on the [Add Parcel] button. The table below will appear. A red asterisks (*) will appear if any required fields are left blank. Users will not able to navigate to the next section or save a section if a field with required information has not been entered.

After the information entered has been saved, a summary table of the property information entered in Table A will appear. From this page, users are able to either "Edit" the property information or "Delete" the record.

If the sale is a multi parcel sale and the two parcels are contiguous and within the same taxing district, both parcels can be on the same SDF. To add another parcel, click on the "Add Parcel" button.

Logout | Main | SDF Form |Change Password | FAQ

PART 1 - To be completed by BUYER/GRANTEE and SELLER

Table A. PROPERTY TRANSFERRED - MUST BE CONVEYED ON A SINGLE CONVEYANCE DOCUMENT

Property Number	Property Address	Billing Address	Parcel Type		
49-00-00-000-000.000-000	1234, Main St	1234, Main St	Land	Edit	Delete

Multiple parcels may listed on one SDF if they are contiguous and are within the same taxing district.

Add Parcel

A. Property | Next B. Conditions

A. Property
B. Conditions
C. Sales Data
D. Preparer
E. Seller(s)/Grantor(s)
F. Buyer(s)/Grantee(s)
Review/Submit

Table B: Conditions

If the green arrow is selected, the user is redirected to "Table B. CONDITIONS". This table consists of fifteen "Yes/No" statements. Here, users identify all conditions that apply for the property that is being transferred.

Every question needs to be answered. The user will not be able to move to another section if one of the questions has not been answered.

Please note there is now, also, a green arrow that allows users to navigate to the previous page.

Logout | Main | **SDF Form** |Change Password | FAQ

Table B. CONDITIONS - IDENTIFY ALL THAT APPLY

Save Part B. CONDITIONS

YES	NO	CONDITION
☑	☐	1. A transfer of real property interest for valuable consideration.
☑	☐	2. Buyer is an adjacent property owner.
☐	☑	3. Vacant Land.
☐	☑	4. Exchange for other real property ("Trade").
☑	☐	5. Seller paid points.*(Provide the value Table C Item 12.)*
☐	☑	6. Change planned in the primary use of the property?*(Describe in special circumstances in Table C Item 3.)*
☑	☐	7. Existence of family or business relationship between buyer and seller.*(Complete Table C Item 4.)*
☐	☑	8. Land contract. Contract term (YY): [____] and contract date (MM/DD/YYYY): [____]
☐	☑	9. Personal property included in transfer.*(Provide the value Table C Item 5.)*
☐	☑	10. Physical changes to property between March 1 and date of sale.*(Describe in special circumstances in Table C Item 3.)*
☑	☐	11. Partial interest.*(Describe in special circumstances in Table C Item 3.)*
☐	☑	12. Easements or right-of-way grants.
☑	☐	13. Document for compulsory transactions as a result of foreclosure or express threat of foreclosure, divorce, court order, judgement, condemnation, or probate.
☑	☐	14. Documents involving the partition of land between tenants in common, joint tenants, or tenants by the entirety.
☐	☑	15. Transfer to a charity, not-for-profit organization, or government.

A. Property
B. Conditions
C. Sales Data
D. Preparer
E. Seller(s)/Grantor(s)
F. Buyer(s)/Grantee(s)
Review/Submit

Save Part B. CONDITIONS

Back A. Property | **B. Conditions** | Next C. Sales Data

Table C: Sales Data

The "Table C. SALES DATA" is where users are able to enter disclosure value information. All of the input boxes on the table require a numeric value <u>except</u> "1. Conveyance date" (date) and "3. Special circumstances" (text). The single form entry will not allow users to enter non-numeric values into numeric fields.

Table C. SALES DATA - DISCLOSURE VALUE OF ITEMS IN TABLE B, ITEMS 1-15

Save Part C. SALES DATA

1. Conveyance date (MM/DD/YYYY): 7/29/2012

2. Total number of parcels: 49

3. Describe any unusual or special circumstances related to this sale, including the specification of any less-than-complete ownership interest and terms of seller financing. Max character Limit is 255.

A. Property
B. Conditions
C. Sales Data
D. Preparer
E. Seller(s)/Grantor(s)
F. Buyer(s)/Grantee(s)
Review/Submit

YES	NO	CONDITION
☐	☑	4. Family or business reationship exsting between buyer and seller? Amount of discount: $

(Discolse actual value in money, property, a service, an agreement, or other consideration.)

5. Estimated value of personal property: $ 10000

6. Sales price: $ 7500

YES	NO	CONDITION
☑	☐	7. Is the seller financing sale? If yes, answer questions (8-13).
☐	☑	8. Is buyer/borrower personally liable for loan?
☐	☑	9. Is this a mortgage loan?

10. Amount of loan: $ 5000

11. Interest rate: 5 %

12. Amount in points: $ 250

13. Amortization period: 100

Save Part C. SALES DATA

Back B. Conditions | C. Sales Data | Next D. Preparer

Table D: Preparer

"Table D. Preparer" is for the preparer's information. In order to make Table D appear, users will need to click on the [Add Preparer] button.

A new feature with Gateway SDF is that it allows users to store the preparer's information so that it does not need to be manually entered each time a user completes a SDF. To store the information, click on the "Save and use this as your profile for later" button after all the preparer's information has been entered.

If the user has already stored their information, they will click the box next to "Use Profile Information?" This will automatically populate the preparer's information for the SDF with the profile information that has been stored and saved.

After the information has been saved, the user will be redirected to a summary table of the preparer's information just entered. Here, users can "Edit" or "Delete" their entry of the preparer's information.

If there is more than one preparer for this transaction, another preparer may be added clicking the "Add Preparer" button.

Table E: Seller(s)/Grantors(s)

"Table E. Seller(s)/Grantors(s)" is for the seller/grantor information. The user can begin data entry of the seller's information by clicking the [Add Seller] button.

After clicking on the "Submit" button, users are redirected to a summary page of the seller's information. Here, users can "Edit" and/or "Delete" the information they have just entered. If there is more than one seller involved in this sale, another seller can be added to the SDF by clicking on the "Add Seller" button.

Table F: Buyer(s)/Grantee(s)

"Table F. Buyer(s)/Grantee(s)" is for the buyer(s)/grantee(s) information. In order to make Table F appear, users need to click on the [Add Buyer] button. In this section, users fill in the buyer's information, as well as any deductions the buyer is applying for. If the buyer is applying for a homestead deduction, the user needs to enter the last 5 digits of the buyer's driver's license and social security number.

After clicking on the "Submit button, users are redirected to a summary table with the buyer's information. Here, users can "Edit" or "Delete" the information they have just entered. Users can, also, add another buyer to this SDF by clicking on the "Add Buyer" button.

Please note that when a user saves the information in this section, a message will pop indicating, the information has been saved and the date and time in which this information was saved.

Review/Submit

Once the user has finished their data entry of all the sections of the SDF, they can view the SDF in its entirety. Users will need to click on the "Review/Submit" link to the right of the application to view their completed SDF.

Users have the option here to "Edit" or "PDF print form" prior to officially submitting to Gateway SDF.

Users can save the data and print a PDF copy of the SDF prior to submitting. This allows users to return and edit the form before submission.

After the SDF has been reviewed, users will click the "Submit" button at the bottom of the page to officially submit the SDF to Gateway SDF. Immediately after clicking on the "Submit" button, a window will pop up asking *"Are you sure you want to do the final submit?"*

If any entry with required information has been left blank, a red asterisks (*) will appear and users will have to fill in that information before they can submit.

After submission, the SDF filing may not be edited. If errors on the form are found, please contact the county assessor's office in which the sale occurred.

Summary of SDFs

All SDFs entered and saved by the user will be displayed on the "Main" tab. The "Main" tab also shows users which entered SDFs have been submitted and which ones have not yet been submitted.

SDFs that have not yet been submitted will have a "No" under the Submitted column with the option to "Edit" or "Delete" those SDFs until they are officially submitted. Likewise, those that have been submitted will have a "Yes" and users will only be allowed to view the PDF of the submitted SDFs.

Logout | **Main** | Change Password | FAQ | FileUpload

Sales Disclosure Forms

Welcome jhdoe@hoosier.com

Begin a new SDF form »

SDF ID	County	Year	Submitted		
C49-2011-0000000	1	2011	Yes	View PDF	
C49-2011-0000000	1	2011	No	Edit	Delete
C49-2011-0000000	1	2011	No	Edit	Delete
C49-2011-0000000	1	2011	No	Edit	Delete

Section 3: Role B - Vendor Counties File Upload

File Upload

Users with the vendor county file upload role will click on the "File Upload" tab after logging in. Here, the application displays the page where users will upload their sales data files. Users will need to click on the "Browse" button of the file they want to upload. The user will, then, navigate to where they saved the sales file, highlight the file, and then click "Open." Users will follow this procedure for each of the three sale files (SALECONTAC, SALEDISC, and SALEPARCEL).

When all three files have been temporarily uploaded and the location and name of the sales file is in the field box, press the "Upload" button to officially upload all three files to Gateway SDF. If a user is missing a file, a red asterisk (*) will appear and the files will not upload.

After the files have been uploaded, an Updated Count of the SDFs uploaded will appear at the bottom of the screen. In addition to the Updated Count, there will be a totals listed for the number of records uploaded within each file (Disclosures, Contacts, and Parcels). There is also an Error Count which shows the number records that have encountered an error while trying to upload. If there is a number under the Error Count column, greater than zero, your files did not load into Gateway SDF. You can see what errors occurred that caused your upload to fail by clicking on the "See Errors" button to the left of the upload history.

The list of records with errors includes the following information: the file name that had the error, the line number in the file, the SDF ID, the field name, and the reason for the error.

Logout | Main | Change Password | FAQ | **SDF Upload** | Search | Lookup

SDF Upload

SALECONTAC: [Browse...] No file selected.

SALEDISC: [Browse...] No file selected.

SALEPARCEL: [Browse...] No file selected.

Current Data [Hancock ▾]

From 1/1/2016 to 1/1/2017

Click here for Details

[Upload] Page Loaded: 12/4/2018 9:40:13 AM

Upload History

	Username	Upload Date	Completed	Update Count	Disclosures	Contacts	Parcels	Error Count
See Errors	cgordon@dlgf.in.gov	02/09/2018	True	2273	2784	10297	3023	0
See Errors	cgordon@dlgf.in.gov	11/01/2017	True	?	?	?	?	5
See Errors	cgordon@dlgf.in.gov	03/29/2017	True	0	5043	18599	5962	0
See Errors	cgordon@dlgf.in.gov	03/28/2017	True	?	?	?	?	8

Select a Page: [1 ▾]   Page 1 of 26

[Refresh Data]

Logout | Main | Change Password | FAQ | SDF Upload | **SDF Upload - Error Details** | Search | Lookup

FileName	Line	SDF_ID	FieldName	Value	Message
131540163193770225_SALEDISC.txt	2654		UNKNOWN	Cannot find value at start:1612 with length:1612	Invalid/Suspect Character Identified at Character Index (Zero-Based Numbering) #1612.
131540163193770225_SALEDISC.txt	2654	C02-2017-0124489	P2_17_Validation_Complete	L	P2_17_Validation_Complete Value 'L' Must Equal or Begin With 'Y', 'y', 'N', or 'n'.
131540163193770225_SALEDISC.txt	2654	C02-2017-0124489	P2_Assessor_Stamp	1	P2_Assessor_Stamp Value '1' Must Equal or Begin With 'Y', 'y', 'N', or 'n'.
131540163193770225_SALEDISC.txt	2654	C02-2017-0124489	P3_5_Transfer_Date	8/18/2017Y	The string was not recognized as a valid DateTime. There is an unknown word starting at index 9.
131540163193770225_SALEDISC.txt	2654	C02-2017-0124489	P3_Auditor_Stamp	Cannot find value at start:1791 with length:1	Index and length must refer to a location within the string. Parameter name: length

Page Loaded: 12/4/2018 9:47:19 AM

To view the SDFs that were uploaded, click on the "Main" tab. The "Main" tab lists all the SDFs that have been uploaded by the same user account.

Section 4: Role C - Title Companies File Upload

File Upload

Users with the title company file upload role will click on the "File Upload" tab after logging in. Here, the application displays the page where users will upload their sales data files. Users will need to click on the "Browse" button of the file they want to upload. The user will, then, navigate to where they saved the sales file, highlight the file, and then click "Open." Users will follow this procedure for each of the three sale files (SALECONTAC, SALEDISC, and SALEPARCEL).

When all three files have been temporarily uploaded and the location and name of the sales file is in the field box, press the "Upload" button to officially upload all three files to Gateway SDF. If a user is missing a file, a red asterisk (*) will appear and the files will not upload.

After the files have been uploaded, a total record count of the SDFs uploaded will appear at the bottom of the screen. In addition to the record count, there will be a list of records that have encountered an error while trying to upload. These records were not loaded into Gateway SDF. The list of records with errors includes the following information: the file that had the error, the line number in the file, the field name, and the reason for the error.

For the title company file upload into Gateway SDF, uploaded files are not officially submitted. In order to submit these SDFs, all forms will need to be reviewed and submitted individually. To start, users will need to return to the main screen by clicking the "Main" tab. Here, users will see all the SDFs that have been uploaded by the same user account.

To delete a particular SDF, users will click the "Delete" button that corresponds to the SDF that they wish to remove.

To review and verify a SDF, users will start the process by clicking the "Edit" button.

Review/Submit

Clicking on the "Edit" button and will prompt users to the "Part A. Property Transferred" section of the SDF. Users should go through the sections of the SDF and verify the information for accuracy. If all the information is accurate, users should click on the "Review/Submit" link.

After clicking on the "Review/Submit" link, users will be navigated to a screen that shows the entire SDF. Users have the option here to "Edit" or "PDF print form" prior to officially submitting to Gateway SDF.

Users can save the data and print a PDF copy of the SDF prior to submitting. This allows users to return and edit the form before submission.

After the SDF has been reviewed, users will click the "Submit" button at the bottom of the page to officially submit a SDF to Gateway SDF. Immediately after clicking on the "Submit" button, a window will pop up asking you *"Are you sure you want to do the final submit?"*

If any entry with required information has been left blank, a red asterisk (*) will appear and users will have to fill in that information before they can submit.

After submission, the SDF filing may not be edited. If errors on the form are found, please contact the county assessor's office in which the sale occurred.

Summary of SDFs

Users can view all SDFs on the "Main" tab.

All SDFs uploaded by the same user account will be displayed on the "Main" tab. The "Main" tab, also, shows users which entered SDFs have been submitted and which ones have not yet been submitted.

SDFs that have not yet been submitted will have a "No" under the Submitted column with the option to "Edit" or "Delete" those SDFs until they are officially submitted. Likewise, those that have been submitted will have a "Yes" and users will only be allowed to view the PDF of the submitted SDFs.

Logout | **Main** | Change Password | FAQ | FileUpload

Sales Disclosure Forms

Welcome joe@hoosier.com

Begin a new SDF form »
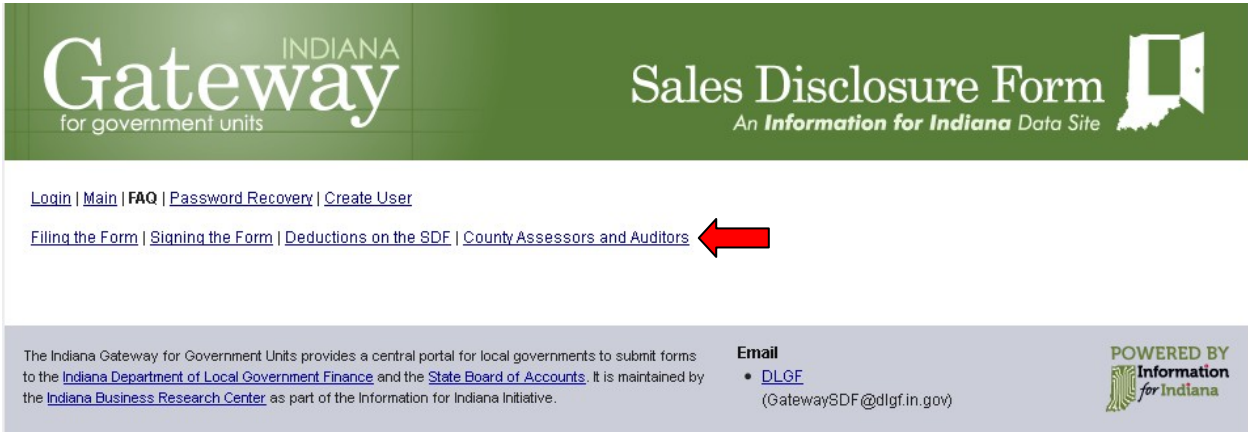
SDF ID	County	Year	Submitted		
C01-2011-0000000	1	2011	Yes	View PDF	
C01-2011-0000000	1	2011	No	Edit	Delete
C01-2011-0000000	1	2011	No	Edit	Delete
C01-2011-0000000	1	2011	No	Edit	Delete
C01-2011-0000000	1	2011	No	Edit	Delete
C01-2011-0000000	1	2011	No	Edit	Delete
C01-2011-0000000	1	2011	No	Edit	Delete
C01-2011-0000000	1	2011	No	Edit	Delete
C01-2011-0000000	1	2011	No	Edit	Delete
C01-2011-0000000	1	2011	No	Edit	Delete
C01-2011-0000000	1	2011	No	Edit	Delete
C01-2011-0000000	1	2011	No	Edit	Delete
C01-2011-0000000	1	2011	No	Edit	Delete

Section 5: Resources

In the main menu bar, there is a Frequently Asked Questions ("FAQ") tab for SDFs. To access the FAQs, users will click on the "FAQ" tab.

Users will be directed to another screen that breaks down the FAQ into its sections. Users will navigate through the sections, by clicking on the various tabs: "Filing the Form," "Signing the Form," "Deductions on the SDF," and "County Assessors and Auditors".

When a user clicks on one of the "FAQ" tabs, a list of FAQs pertaining to the tab heading will appear on the screen. The user can retrieve the answer to a question by clicking on the question. The answer will then appear below the question.

If a user has any questions regarding the SDF FAQs or any questions regarding Gateway SDF, please email the Department at GatewaySDF@dlgf.in.gov.