



Visit Gateway SDF at http://gatewaysdf.ifionline.org

# Gateway Sales Disclosure Form ("SDF") User Guide



## Sales Disclosure Form

## **Table of Contents**

Section 1: Getting Started

New Users

**Returning Users** 

Section 2: Role A - Single Form Entry

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

Beginning a New SDF

Table A: Property Transferred

Table B: Conditions

Table C: Sales Data

Table D: Preparer(s)

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

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

Section 3: Role B - Vendor Counties File Upload

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

Section 4: Role C - Title Companies File Upload

*Who uses this role*: Title companies and other mass users in counties that use Gateway SDF's single form entry will utilize Gateway SDF's file upload for title companies.

Section 5: Resources

## Section 1: Getting Started

To access the Gateway SDF, type <u>http://gatewaysdf.ifionline.org</u> 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 "Create New SDF User Account." Users that already have an account can simply click "Login."

Gateway for government units	Sales Disclosure Form
Sales Disclosure Forms	
Returning Users	New User
• Loain	Create New SDF User Account     Find out where to file for a county: -Select One-
Please click here for <u>Frequently asked questions</u>	
The Indiana Gateway for Government Units provides a central portal for local governments to to the <u>Indiana Department of Local Government Finance</u> and the <u>State Board of Accounts</u> . It is the <u>Indiana Business Research Center</u> as part of the Information for Indiana Initiative.	

#### **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".

Gateway for government units	Sales Disclosure Form
Login   Create User   Main   FAQ   Password Recovery	
Cign Lin for a New Assount	
Sign Up for a New Account	
□ I work in the County Assessor's Office requesting upload cap	ability
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.go∨
Confirm Email:	jsmith@in.go∨
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 /	Accoui	nt	
🗹 I work	in the County	Assessor's O	ffice requesti	ing upload capability	
🗆 I work	at a Title Con	npany requesti	ng upload ca	apability.	
Title:	Assessor		]		
County:	Adams	•			
F	irst Name:	John			
L	ast Name:	Smith			
	Email:	jsmith@in.go	)V		
Conf	firm Email:	jsmith@in.go	)V		
I	<sup>p</sup> assword:	••••			
Confirm I	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.

_	a New Account / Assessor's Office requesting upload capability
☑ I work at a Title Cor	mpany requesting upload capability.
Title:	
County: Marion	
First Name:	John
Last Name:	Smith
Email:	jsmith@in.go∨
Confirm Email:	jsmith@in.go∨
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.

Gateway for government units	Sales Disclosure Form
Login   Create User   Main   FAQ   Password Recovery	
Login	
Email: Password:	
C Remember me next time.	
Can't access your account?	
The Indiana Gateway for Government Units provides a central portal for local governments to to the Indiana Department of Local Government Finance and the <u>State Board of Accounts</u> . It is the Indiana Business Research Center as part of the Information for Indiana Initiative.	

**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.

Login | Create User | Main | FAQ | Password Recovery

## Forgot Your Password?

Forgot Your Password?

Enter your Email Address to receive your password.

Email Address:	
	•

Submit	
--------	--

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".* 

Gateway for government units	Sales Disclosure Form
Login   Create User   Main   FAQ   Password Recovery	
Login	
Email:	
Password:	
$\square$ Remember me next time.	
Log In	
Can't access your account?	
The Indiana Gateway for Government Units provides a central portal for local governments to su to the Indiana Department of Local Government Finance and the <u>State Board of Accounts</u> . It is mu the Indiana Business Research Center as part of the Information for Indiana Indiative.	intained by • DLGF
and <u>indiana business research center</u> as part of the information for indiana litilative.	(GatewaySDF@dlgf.in.gov)

**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 <u>GatewaySDF@dlgf.in.gov</u>.

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 <u>GatewaySDF@dlgf.in.gov</u>.

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 <u>GatewaySDF@dlgf.in.gov</u>.

## **Section 2: Role A - Single Form Entry**

## **Beginning New SDF**

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

Gateway for s vernment units	Sales Disclosure For An Information for Indiana Data	
Logout   Main   Change Password   FAQ		
Sales Disclosure Forms Welcome rscruggs@dlgf.in.gov.		
Begin a new SDF form »		
The Indiana Gateway for Government Units provides a central portal for local governments to sub to the Indiana Department of Local Government Finance and the <u>State Board of Accounts</u> . It is main	ntained by • <u>DLGF</u>	POWERED BY
the Indiana Business Research Center as part of the Information for Indiana Initiative.	(GatewaySDF@dlgf.in.gov)	200 Jan Marian

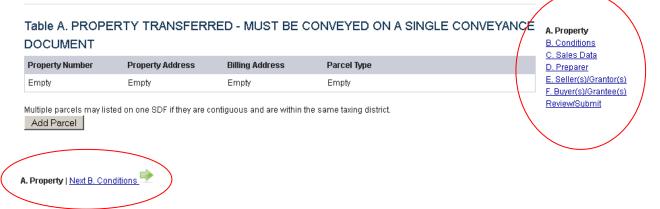
After clicking on the link, notice there is a new tab titled "SDF Forms". Here, the user is prompted to choose a location of the sale (county in which the sale took place) and the year of the transaction from the drop down menus. Once a selection has been made, click the "Create SDF ID and start form"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

Gaieway for goven units	ales Disclosure Form An Information for Indiana Data Site	
Logout   Main   SDF Form  Change Password  FAQ Sales Disclosure Forms Welcome rscruggs@dlgf.in.gov.		
Please select location of sale: -Select-		
Create SDF ID and start form The Indiana Gateway for Government Units provides a central portal for local governments to submit to the Indiana Department of Local Government Finance and the <u>State Board of Accounts</u> . It is maintail the Indiana Business Research Center as part of the Information for Indiana Initiative.		POWERED BY

**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.

Logout | Main | SDF Form |Change Password | FAQ

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



**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?*"

Gate	INDIANA Way	Sa	les Disclosure Form
_oqout   Main   SDF Form			
PART 1 - To	be completed by	BUYER/GRAN	TEE and SELLER
Table A. PROPER	RTY TRANSFERRED -	MUST BE CONVEYE	D ON A SINGLE CONVEYANCE DOCUMENT
Property Number	Property Address	Billing Address	Parcel Type
Empty	Empty	Empty	Empty
Multiple parcels may lister Submit Cancel * Required Field	d on one SDF if they are contiguou	s and are within the same taxing	a district.

#### **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.

Property Number	Property Address	Billing Address	Parcel Type		
49-00-00-000-000.000-000	1234, 1234	1234, 1234	Land		
luttiple parcels may listed on one Submit Cancel Required Field	· -	ifannlicahle		6. Complete Tax Billing Address (if different	-
1. Property Number	to parcel	5. Complete Ac	Idress of Property	from property address)	
Parcel: 49-00-00-000-000.000- OR Sub Division: Lot.	00 □ 2. Split ☑ 3. Land □ 4. Impr	11201		Check if Same as Property Address Street Address: 1234 City: Main St State: IN  Zip Code: 46202	A. Property B. Condition C. Sales Ds D. Preparer E. Seller(s)/Gr E. Buver(s)/Gr: Review/Sub
7. Legal Description of Parcel:				 	

A. Property | Next B. Conditions

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.



#### **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

Tabl	Table B. CONDITIONS - IDENTIFY ALL THAT APPLY					
Sav	e 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.)	A. Property			
		7. Existence of family or business relationship between buyer and seller.(Complete Table C (tem 4.)	B. Conditions C. Sales Data			
	V	8. Land contract. Contract term (YY): and contract date (MM/DD/YYYY):	D. Preparer E. Seller(s)/Grar			
	✓	9. Personal property included in transfer. (Provide the value Table C Item 5.)	<u>F. Buyer(s)/Gran</u> <u>Review/Submit</u>			
	•	10. Physical changes to property between March 1 and date of sale.( <i>Describe in special circumstances in Table C Item</i> 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.				
Save Part B. CONDITIONS						
Back	Back A. Property   B. Conditions   Next C. Sales Data					

ntor(s) itee(s)

#### **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/2027777):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.				
YES NO CONDITION	<u>A. Property</u> B. Conditions			
4. Family or business reationship exsting between buyer and seller? Amount of discount. \$	C. Sales Data			
(Discolse actual value in money, property, a service, an agreement, or other consideration.)	<u>D. Preparer</u> <u>E. Seller(s)/Grantor(s)</u>			
5. Estimated value of personal property: \$10000	<u>F. Buyer(s)/Grantee(s)</u> Review/Submit			
6. Sales price: \$ 7500	<u></u>			
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 Ioan: \$ <mark>5000</mark>				
11. Interest rate: 5 %				
12. Amount in points: \$250				
13. Amortization period: 100				
Save Part C. SALES DATA				

#### **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.

Preparer Name	Preparer Comp	any Preparer Address	
Empty	Empty	Empty	
Submit Cancel	Use Profile Information?	Save and use this as your profile for later	
Preparer Company	arer Title Suffix		
Hoosier			
First Name Mid	dle Name Last Name		A. Property
John	Michael	Doe	B. Conditions
Address (Number and Street)			C. Sales Data D. Preparer
1234 Main St.			E. Seller(s)/Grantor(s)
Address 2			F. Buyer(s)/Grantee(s) Review/Submit
City State	Zip		
Indianapolis	IN 💌 46202		
Telephone Number	Ext. E-mail		
(555) 555-5555	jmdo	e@hoosier.com	
Submit Cancel	Use Profile Information?	Save and use this as your profile for later	_

#### Table D. PREPARER - PREPARER OF THE SALES DISCLOSURE FORM

🗲 Back C. Sales Data | **D. Preparer** | Next E. Seller(s)/Grantor(s) 🐑

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.

Logout   Main   SDF Form  Change Password   FAQ					
Table D. PREPARER -	A. Property				
Preparer Name	Preparer Company	Preparer Address		<u>B. Conditions</u> C. Sales Data	
Doe, John	Hoosier	1234 Main St., Indianapolis	Edit Delete	C. Sales Data D. Preparer E. Seller(s)/Grantor(s) F. Buyer(s)/Grantee(s)	
Add Preparer	arer   <u>Next E. Seller(s)/Grantor(s)</u>			Review/Submit	

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.

<u>tv</u> ions
Data
<u>°er</u> s)/Grantor(s)
s)/Grantee(s)
<u>ubmit</u>

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.

	IChange Password   FAQ R(S)/GRANTOR(S)			A. Property
Seller Name	Seller Company	Seller Address		B. Conditions
Doe, John	Boiler	1234 Main St., Indianapolis	Edit Delete	C. Sales Data D. Preparer E. Seller (s)/Grantor (s) F. Buver (s)/Grantee (s)
Add Seller				<u>Review/Submit</u>
🗲 <u>Back D. Preparer</u>   E.	Seller(s)/Grantor(s)   <u>Next F. Buyer(s)/Gra</u>	intee(s) 🌩		

#### 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 <u>Add Buyer</u> 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.

Empty	e Buyer Company	Buyer Address	
	Empty	Empty	
Submit	Cancel		
uyer Compa	ny Suffix		]
Hoosier			
irst Name	Middle Name Last Nam	ne	
John	Michael	Doe	
ddress (Num	ber and Street)		
234 Main	St		
ity	State Zip		
ndianapol	lis IN 🔻 46202		
elephone Nu			
555)555-5	555 jmdoe@hoosier.com		
Would y	rou like to receive tax bills by e-mail at this	address?	
ursuant to	House Enrolled Act 1344-2009, filers for ho	mestead deductions and their spouses are now required to provide the last	
		ot have Social Security Numbers, the last 5 digits of their state driver's te that if you are not filing for a homestead deduction, you DO NOT need to	
	information.		A. Property B. Conditions
			C. Sales Data
ast 5 Digits	s of Driver's License/ID/Other Number:0000	DO IN 🔽	D. Preparer E. Seller(s)/Grantor
ast 5 Digits	s of Social Security Number: 00000		F. Buyer(s)/Grantee
			Review/Submit
Submit	Cancel		
	rt F. BUYER(S)/GRANTEE(S)		
ES NO	CONDITION	man residence? Dravide complete address of primar readidence, include	luding
		mary residence? Provide complete address of primary resdidence, incl	luaing
V	county:		
V	county: Street Address:	City:	
		City: County: Adams	
	Street Address: State: IN 💌 Zip Code:	County: Adams	idress of
	Street Address: State: IN I Zip Code: 2. Does the buyer have a homestead	County: Adams	idress of
	Street Address: State: IN 💌 Zip Code: 2. Does the buyer have a homestead primary resdidence being vacated, in	County: Adams	idress of
ব	Street Address: State: N Zip Code: 2. Does the buyer have a homestead primary resolidence being vacated, in Street Address:	County: Adams	ldress of
	Street Address: State: IN 💌 Zip Code: 2. Does the buyer have a homestead primary resdidence being vacated, in Street Address: State: IN 💌 Zip Code:	County: Adams	idress of
	Street Address: State: IN 💌 Zip Code: 2. Does the buyer have a homestead primary residence being vacated, in Street Address: State: IN 💌 Zip Code: CONDITION	County: Adams	idress of
	Street Address: State: N Zip Code: 2. Does the buyer have a homestead primary residdence being vacated, in Street Address: State: N Zip Code: CONDITION 3. Homestead 4. Solar Energy Heating/Cooling System 5. Wind Power Device	County: Adams	ldress of
	Street Address: State: N Zip Code: 2. Does the buyer have a homestead primary resolidence being vacated, in Street Address: State: N Zip Code: CONDITION 3. Homestead 4. Solar Energy Heating/Cooling Syst 5. Wind Power Device 6. Hydroelectric Power Device	County: Adams	idress of
	Street Address: State: N Zip Code: 2. Does the buyer have a homestead primary residdence being vacated, in Street Address: State: N Zip Code: CONDITION 3. Homestead 4. Solar Energy Heating/Cooling Syst 5. Wind Power Device 6. Hydroelectric Power Device 7. Geothermal Energy Heating/Cooling	County: Adams	ldress of
	Street Address: State: N Zip Code: 2. Does the buyer have a homestead primary resolidence being vacated, in Street Address: State: N Zip Code: CONDITION 3. Homestead 4. Solar Energy Heating/Cooling Syst 5. Wind Power Device 6. Hydroelectric Power Device	County: Adams	idress of
	Street Address: State: N Zip Code: 2. Does the buyer have a homestead primary residdence being vacated, in Street Address: State: N Zip Code: CONDITION 3. Homestead 4. Solar Energy Heating/Cooling Syst 5. Wind Power Device 6. Hydroelectric Power Device 7. Geothermal Energy Heating/Cooling	County: Adams	idress of

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.

_		ALL TEMS THAT APPLY				
Buye	r Name	Buyer Company	Buyer Address			
Doe,	John	Hoosier	1234 Main St., Indianapolis 🛛 🚽	dit velete		
Add	Add Buyer					
Sav YES	e Part	F. BUYER(S)/GRANTEE(S) (Saved Successfully at 8/14) CONDITION	2012 8:53:21 AM			
		1. Will this property be the buyer's primary residence? Provi county:	de complete address of primary resdidence,	, including	<u>A. Property</u> B. Conditions	
		2. Does the buyer have a homestead in Indiana to be vacate primary resdidence being vacated, including county. Street Address:	Adams	te address of	C. Sales Data D. Preparer E. Seller(s)/Grantor(s) F. Buyer (s)/Grantee(s) Review/Submit	
YES	NO	CONDITION				
•		3. Homestead				
	$\checkmark$	4. Solar Energy Heating/Cooling System				
✓		5. Wind Power Device				
	•	6. Hydroelectric Power Device				
~		7. Geothermal Energy Heating/Cooling Device				
4	₽ e Part ck E.	8. Is this property a residential rental property? F. BUYER(S)/GRANTEE(S) Saved Successfully at 8/14. pperty   F. Buyer(s)/Grantee(s)   Next Review/Submit	2012 8:53:21 AM			

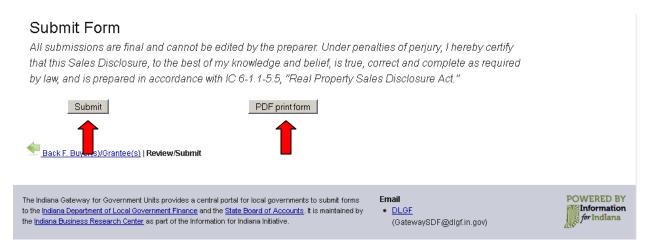
Table F.  $\mathsf{BUYER}(\mathsf{S})/\mathsf{GRANTEE}(\mathsf{S})$  - APPLICATION FOR PROPERTY TAX DEDUCTIONS - IDENTIFY ALL ITEMS THAT APPLY

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.



## 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.

Gatewa for government units	Sales Disclosure Form
Logout   Main   Change Password   FAQ   Fil	eUpload
SALECONTAC:	S\Tax Review\2011 Sal Browse
SALEDISC:	Browse
SALEPARCEL:	Browse
Upload Upload Cook in: My Recent Documents Wy Documents My Documents My Computer My Network Places	Adams Sales Data     SALECONTAC_2010A   SALEDISC_2010A   SALEPARCEL_2010A     File name:     Pile name:     Open     Carter     Open     Carter

#### **Role B – Vendor Counties File 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.

Gate		JA V		formation for Indiana Data Site
Logout   Main   Change Pass	sword   FAQ   FileUpl	oad		
SALECO AC:		1	Browse_	
SALEDIS		[	Browse.	
SALEPARCEL			Browse.	
Upload				
File	Line Number	SDF_ID	Field	Value
Adams - SALECONTAC.td	5	C01-2011-000000	Email_Tax_Statement	Missing value(s) at position 470 with length 1
Adams - SALECONTAC.bt	6	C01-2011-800000	Email_Tax_Statement	Missing value(s) at position 470 with length 1

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.

Locault   Main   Chance Password   FAQ   FileUptool     SALECONTAC:   SALEDISC:   Browse   SALEPARCEL:   Uplood   If Uplood   Image:	Gate for government u	Sales Disclosure Form
SALEDISC: SALEPARCEL: Upload	Logout   Main   Change Pass	sword   FAQ   FileUpload
SALEPARCEL: Upload Look in: Adams Sales Data SALECONTAC_2010A SALECONTAC_2010A SALEDISC_2010A SALEPARCEL_2010A SALEPARCEL_2010A	SALECONTAC:	S\Tax Review\2011 Sal_Browse
Uploed Look in: Adams Sales Data SALECONTAC_2010A SALEDISC_2010A SALEPARCEL_2010A SALEPARCEL_2010A	SALEDISC:	Browse
Upload Look in: Adams Sales Data SALECONTAC_2010A SALEDISC_	SALEPARCEL:	Browse
Places Files of type: All Files	and a second sec	Look in: Adams Sales Data

#### **Role C – Title Companies File 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.

Gate		V V		isclosure Form
Logout   Main   Change Pass	sword   EAQ   FileUpl	load		
SALECO RC		Г	Browse_	
SALEDIS		[	Browse.	
SALEPARCEL:		1	Browse.	
Upload				
File	Line Number	SDF_ID	Field	Value
Adams - SALECONTAC bd	5	C01-2011-000000	Email_Tax_Statement	Missing value(s) at position 470 with length 1
Adams - SALECONTAC.bt	8	C01-2011-800000	Email_Tax_Statement	Missing value(s) at position: 470 with length: 1

#### **Role C – Title Companies File Upload**

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.

Sales Disclosure Form

An Information for Indiana Data Site

Edit

Edit

Edit

Delete

Delete

Delete

Welcome Jdoe@hoosier.com Begin a new SDF form » SDF ID County Year Submitted 2011 Edit Delete C01-2011-0000000 1 No 2011 No Edit Delete 1 C01-2011-0000000 C01-2011-0000000 1 2011 No Edit Delete C01-2011-0000000 2011 No Edit Delete 1 C01-2011-0000000 1 2011 No Edit Delete C01-2011-0000000 Edit 1 2011 Delete No 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 2011 No Edit Delete 1

No

No

No

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.

Logout | Main | Change Password | FAQ | FileUpload Sales Disclosure Forms

C01-2011-0000000

C01-2011-0000000

C01-2011-0000000

1

1

1

2011

2011

2011

#### **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.

Gate	INDIANA Way		Sales Disclosure Form	
PART 1 - To		l by BUYER	GRANTEE and SELLER	
Table A. PROPER DOCUMENT	TY TRANSFERRE	ED - MUST BE (	CONVEYED ON A SINGLE CONVEYANCE A. Property B. Conditions	
Property Number	Property Address	Billing Address	Parcel Type C. Sales Data	
010000000000000000000000000000000000000	1234 Main St. Decatur	1234 Main St. Decatur	Land Improvement Edit Delete E. Seller(s)/Grantor(s F. Buyer(s)/Granter(s	

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

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.

#### Submit Form All submissions are final and cannot be edited by the preparer. Under penalties of perjury, I hereby certify that this Sales Disclosure, to the best of my knowledge and belief, is true, correct and complete as required by law, and is prepared in accordance with IC 6-1.1-5.5, "Real Property Sales Disclosure Act." Submit PDF print form (s)/Grantee(s) | Review/Submit POWERED BY The Indiana Gateway for Government Units provides a central portal for local governments to submit forms Fmail Information to the Indiana Department of Local Government Finance and the State Board of Accounts. It is maintained by DLGF for Indiana the Indiana Business Research Center as part of the Information for Indiana Initiative. (GatewaySDF@dlgf.in.gov)

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.



Sales Disclosure Form

Logout | Main | Change Password | FAQ | FileUpload

Sale Disclosure Forms

Welcome pe@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

#### **Role C – Title Companies File Upload**

## **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.

Gateway for government units	Sales Disclosure Form
Login   Create User   Main   FAQ   Password Recovery	
Login frail: Email: Password:	
C Remember me next time.	
Can't access your account?	
The Indiana Gateway for Government Units provides a central portal for local governments to su to the Indiana Department of Local Government Finance and the <u>State Board of Accounts</u> , it is m the Indiana Business Research Center as part of the Information for Indiana Initiative.	

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".

Gateway for government units	Sales Disclosure	
Login   Main   FAQ   Password Recovery   Create User Filing the Form   Signing the Form   Deductions on the SDE   County Assessors and A	Auditors	
The Indiana Gateway for Government Units provides a central portal for local governments to sub to the Indiana Department of Local Government Finance and the <u>State Board of Accounts</u> . It is ma the Indiana Business Research Center as part of the Information for Indiana Initiative.		POWERED BY

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.

Gateway for government units	Sales Disclosure Form
Logout  Main   Change Password   FAQ   FileUpload	
Filing the Form   Signing the Form   Deductions on the SDF   County A:	
When must an SDF be submitted?	
When a transfer of a real property interest is made for valuable consic regardless of whether any conditions apply. Even if a transfer is made B(12) through and including B(15) on the form apply, a form must be consideration and none of the conditions B(12) through and including (and thus there is no fee to pay).	e without consideration but any of conditions submitted. If a transfer is made without
When is an SDF not required?	
Where do I file an SDF?	

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