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

Gateway Sales Disclosure Form ("SDF") User Guide

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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.

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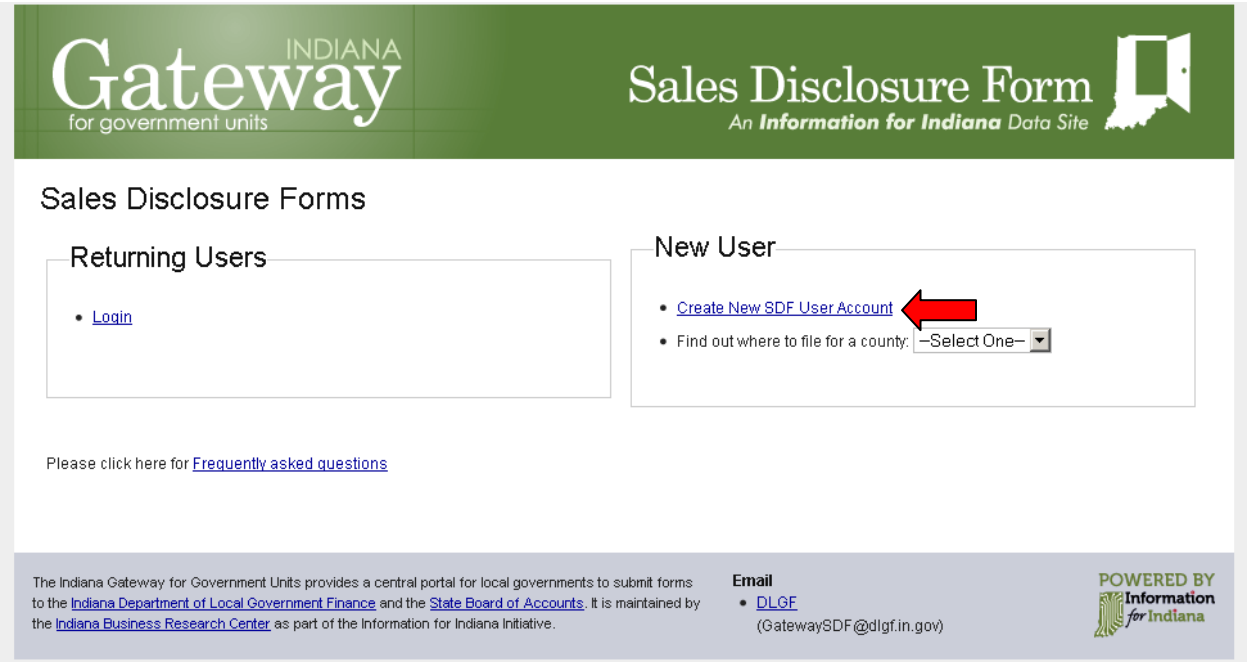
Section 1: Getting Started

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 "Create New SDF User Account." Users that already have an account can simply click "Login."



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".

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.

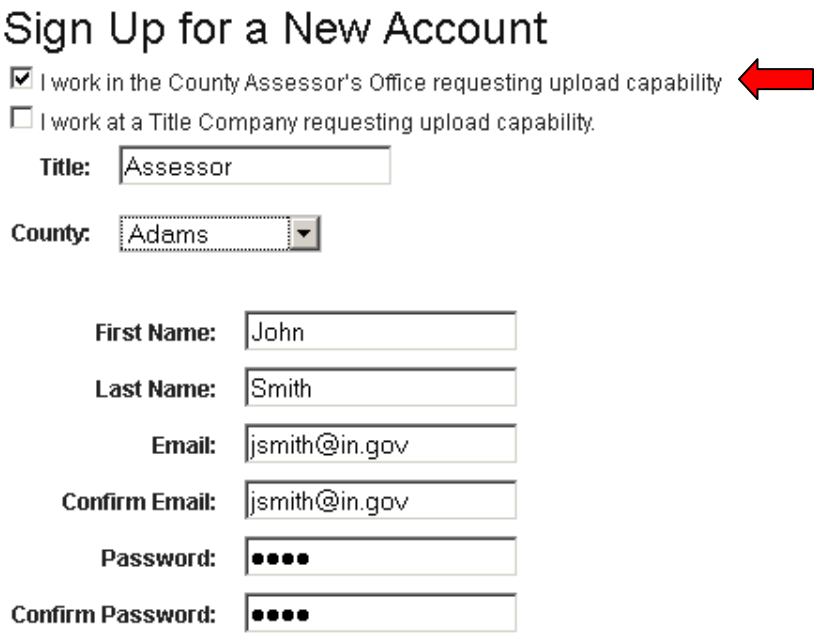
How: When creating an account for the single form entry, users will need to enter an email and password and reenter the same information in the "confirm" fields but will not need to check one of the boxes above the First Name field.

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.



Role C: Title Companies File Upload

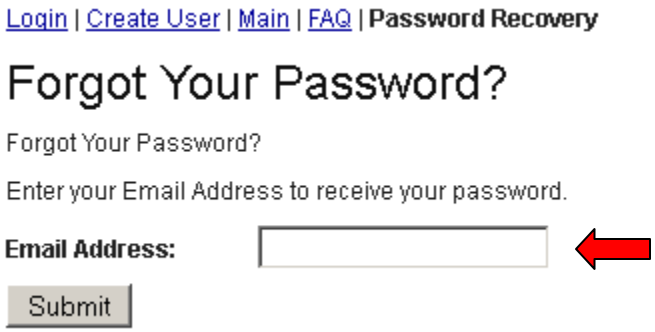
Who: Title companies and other mass users in counties that use Gateway SDF's single form entry may choose to utilize Gateway SDF's file upload for title companies.

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.

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.

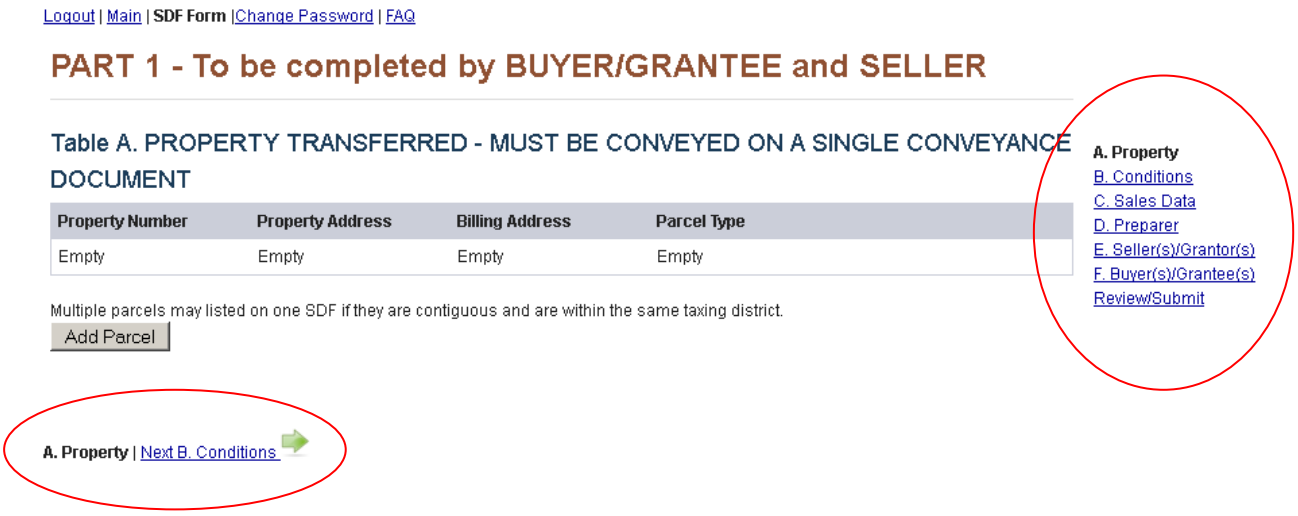
Section 2: Role A - Single Form Entry

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?"*

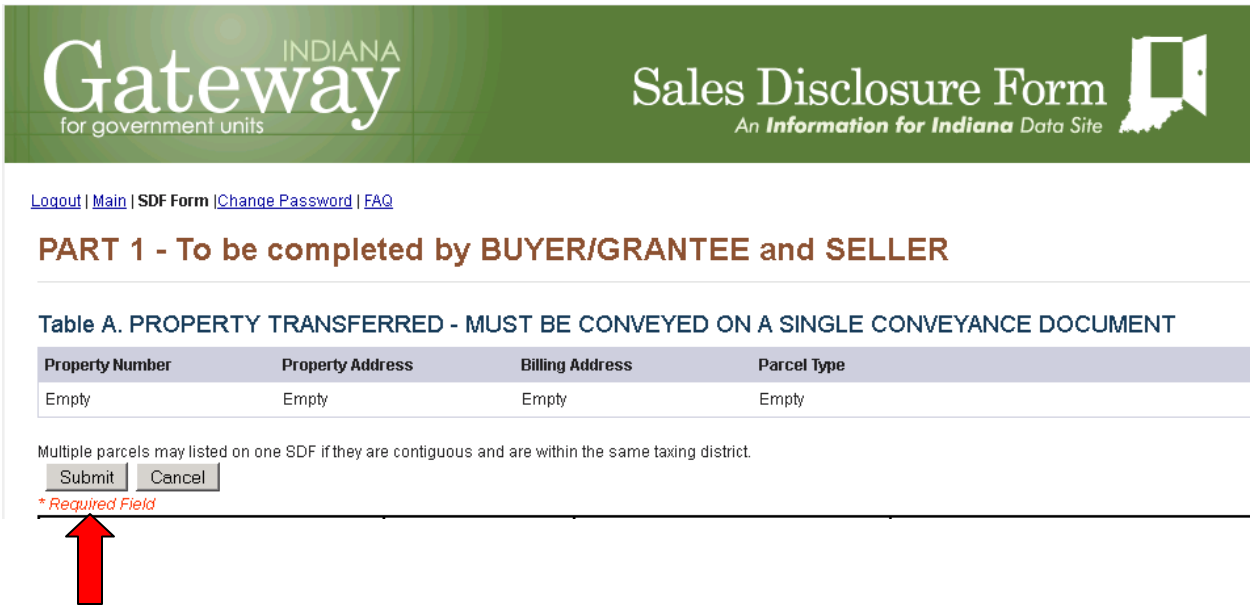
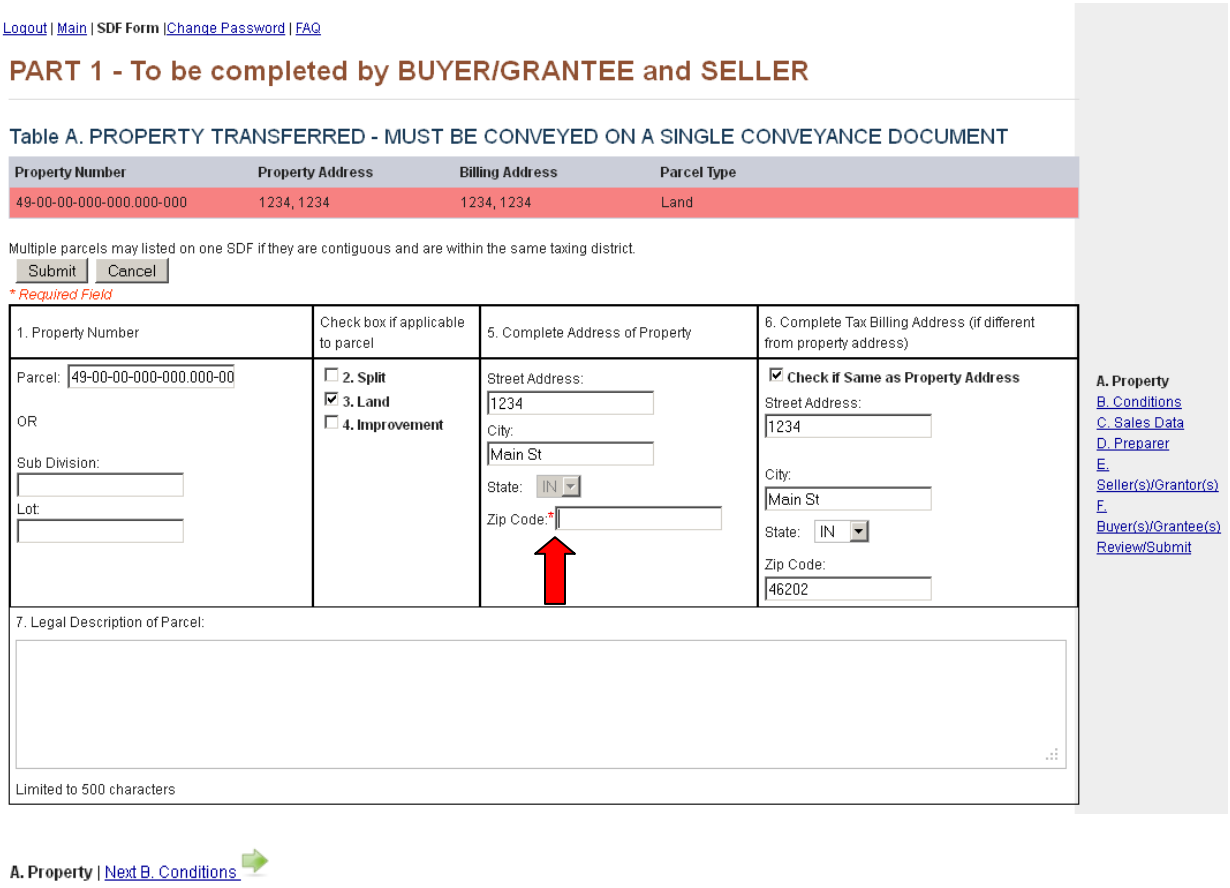


Table A: Property Transferred

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.

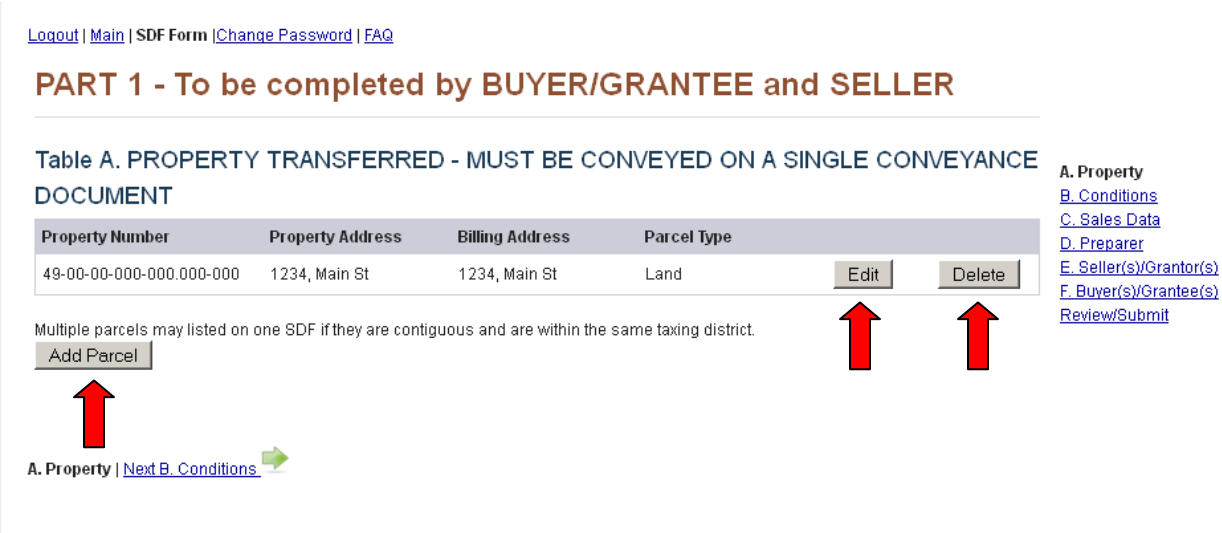


Table B: Conditions

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.

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 except "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.

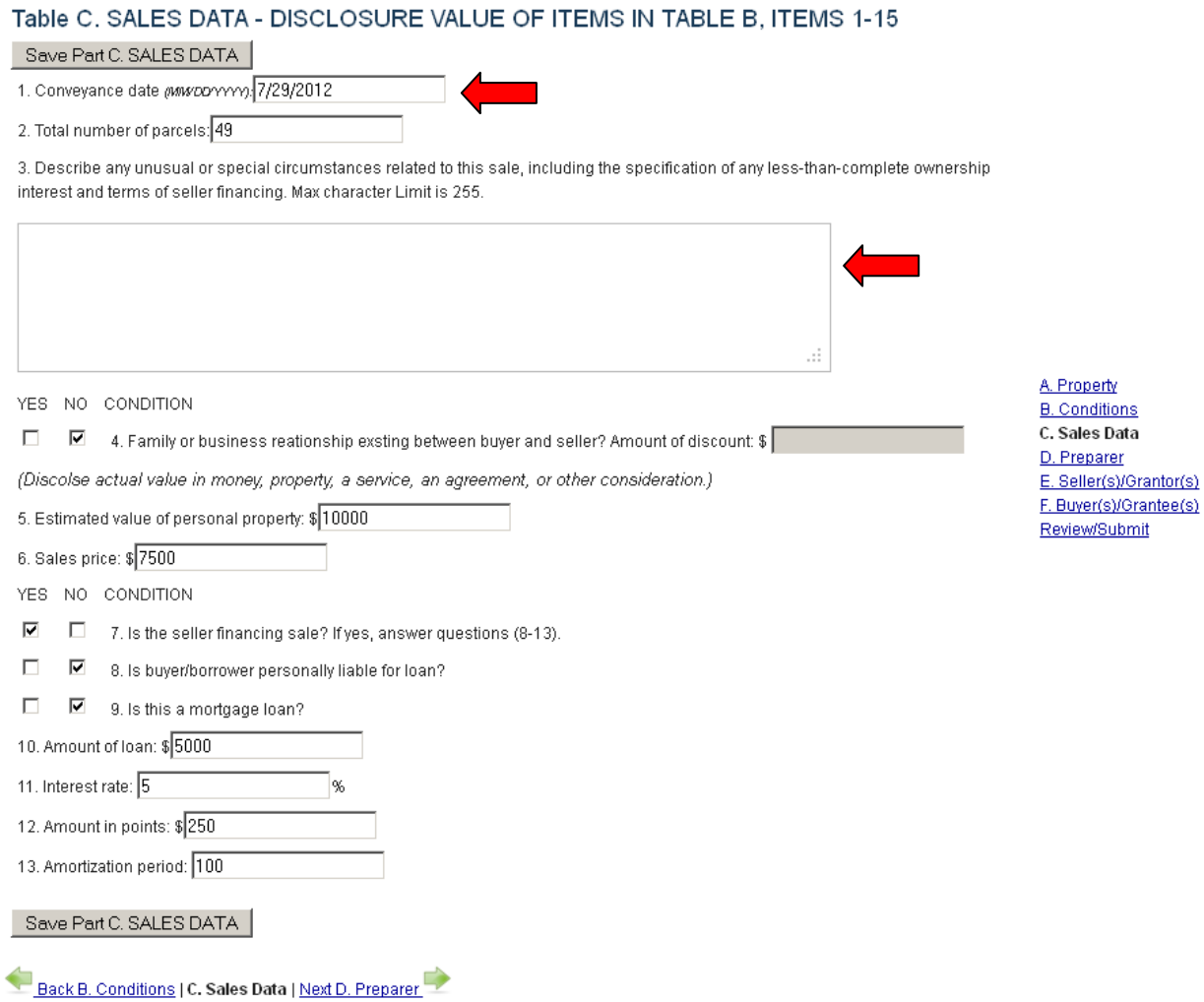
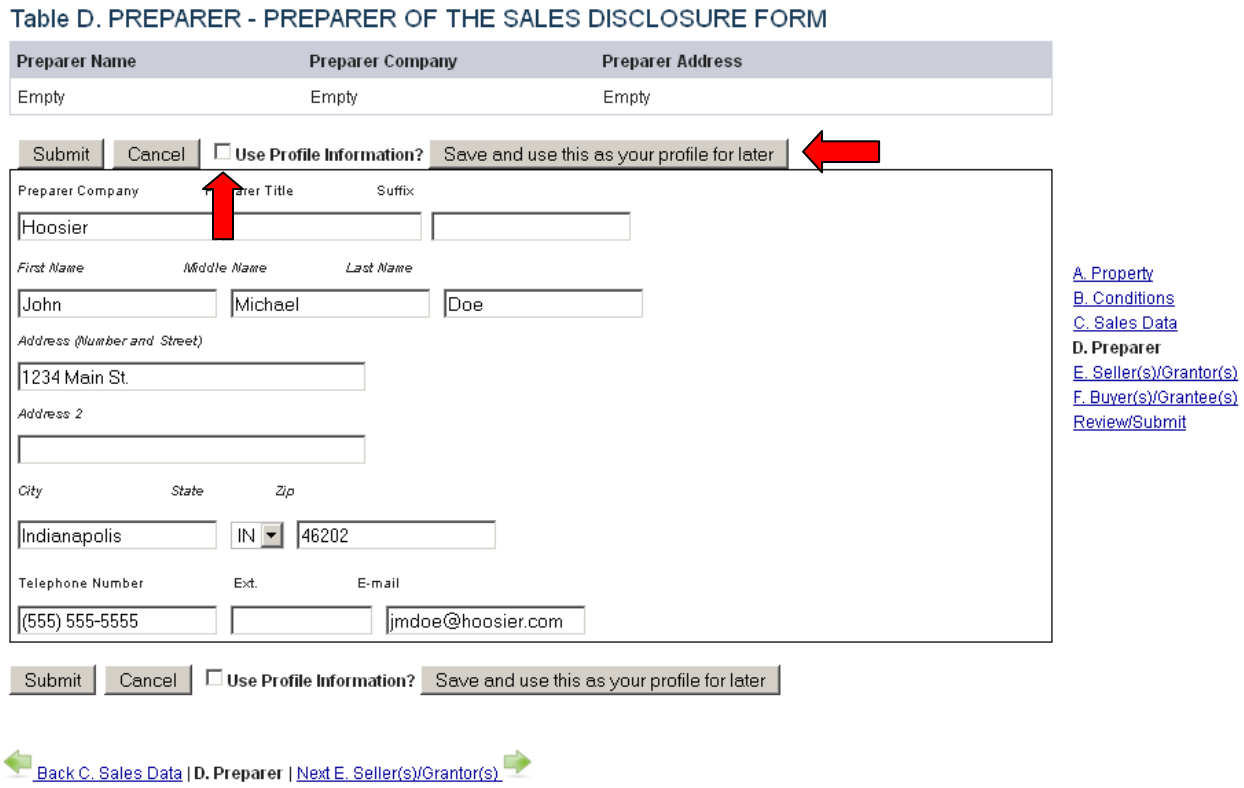


Table D: Preparer

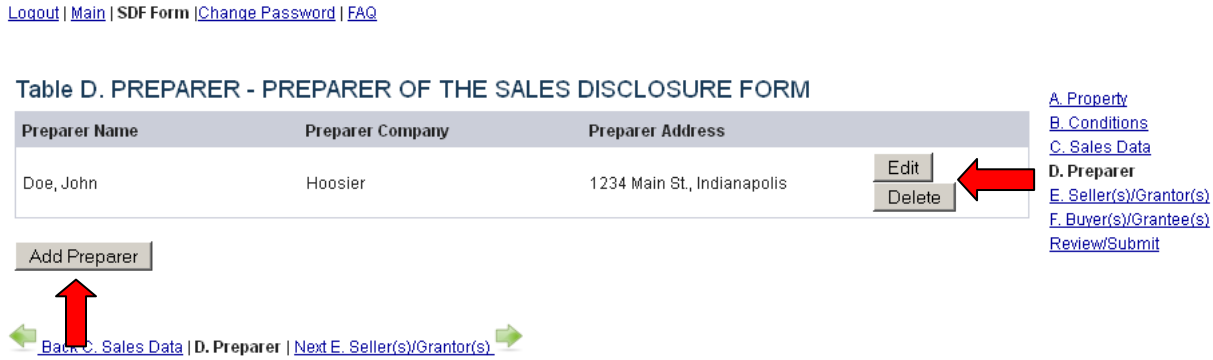
"Table D. Preparer" is for the preparer's information. In order to make Table D appear, users will need to click on the Add Preparer button.

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.



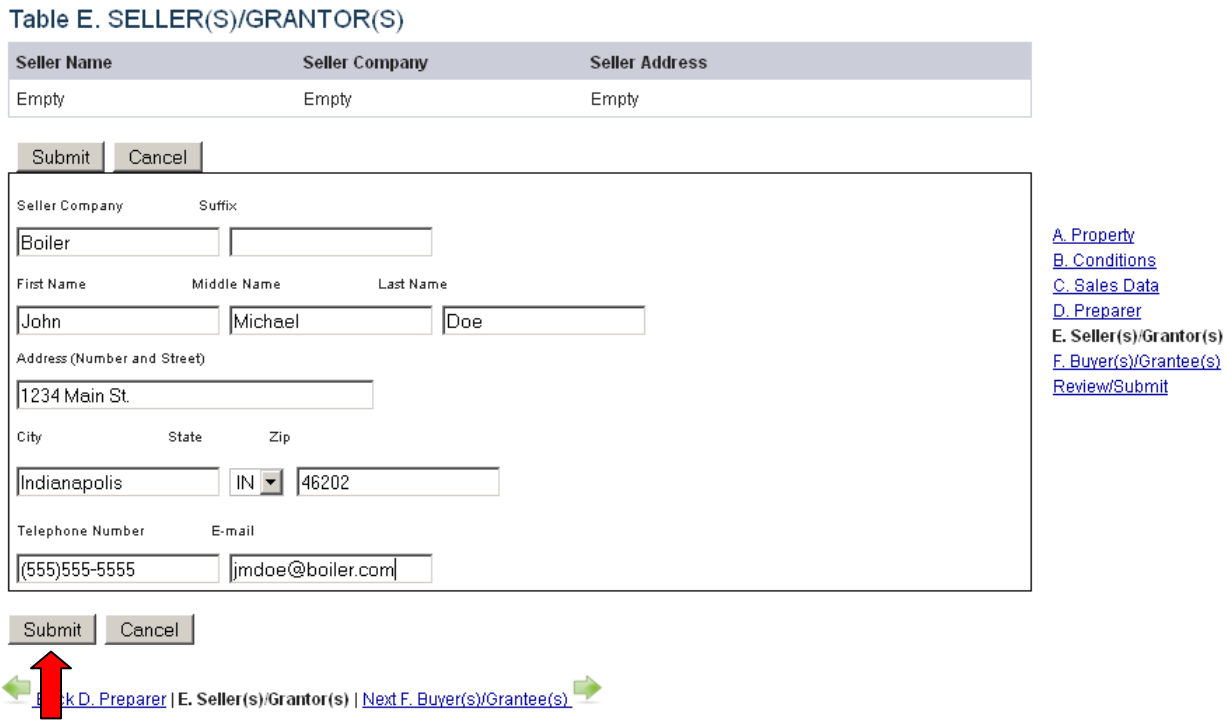
After the information has been saved, the user will be redirected to a summary table of the preparer's information just entered. Here, users can "Edit" or "Delete" their entry of the preparer's information.



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)

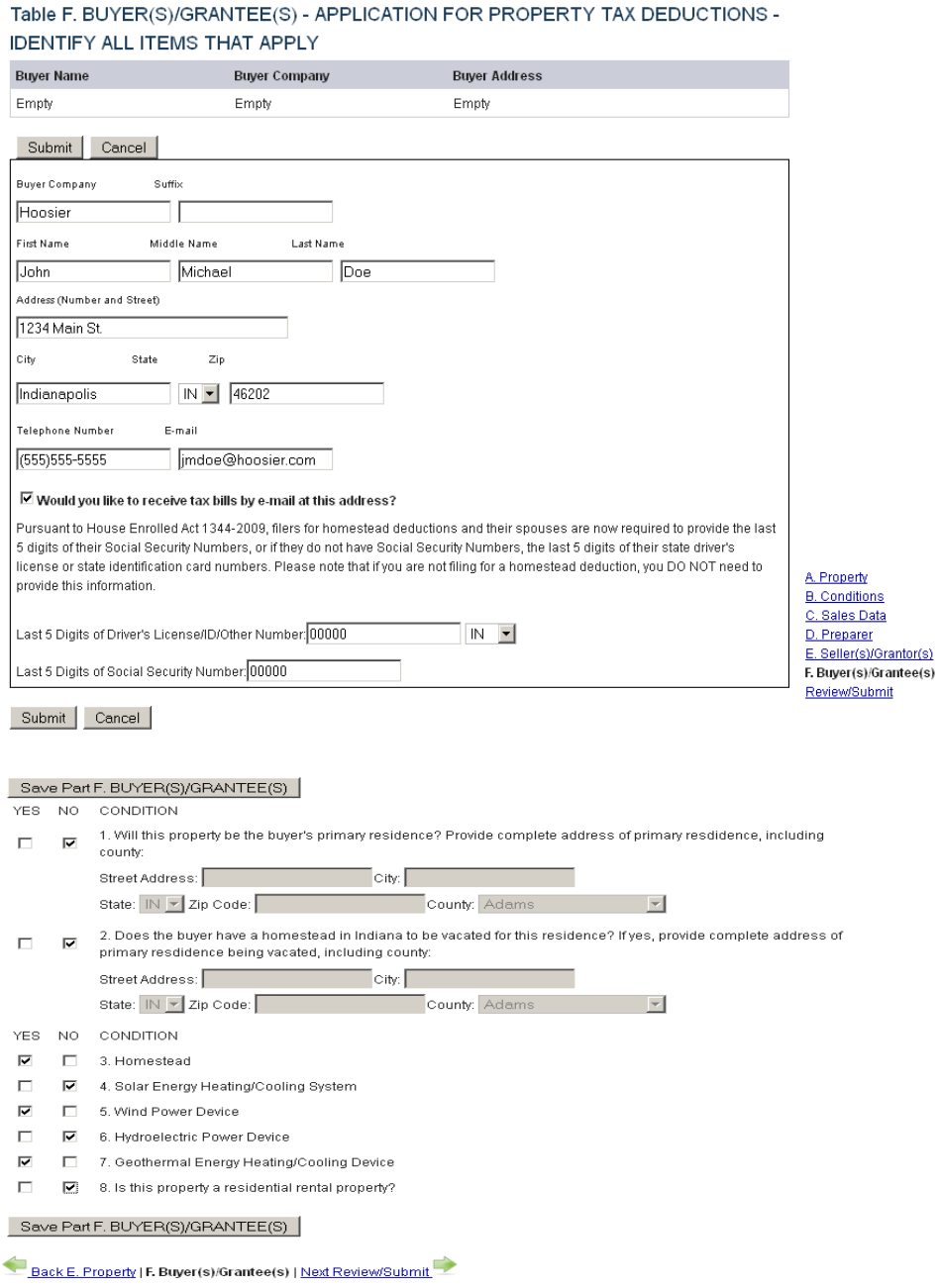
"Table E. Seller(s)/Grantors(s)" is for the seller/grantor information. The user can begin data entry of the seller's information by clicking the Add Seller button.



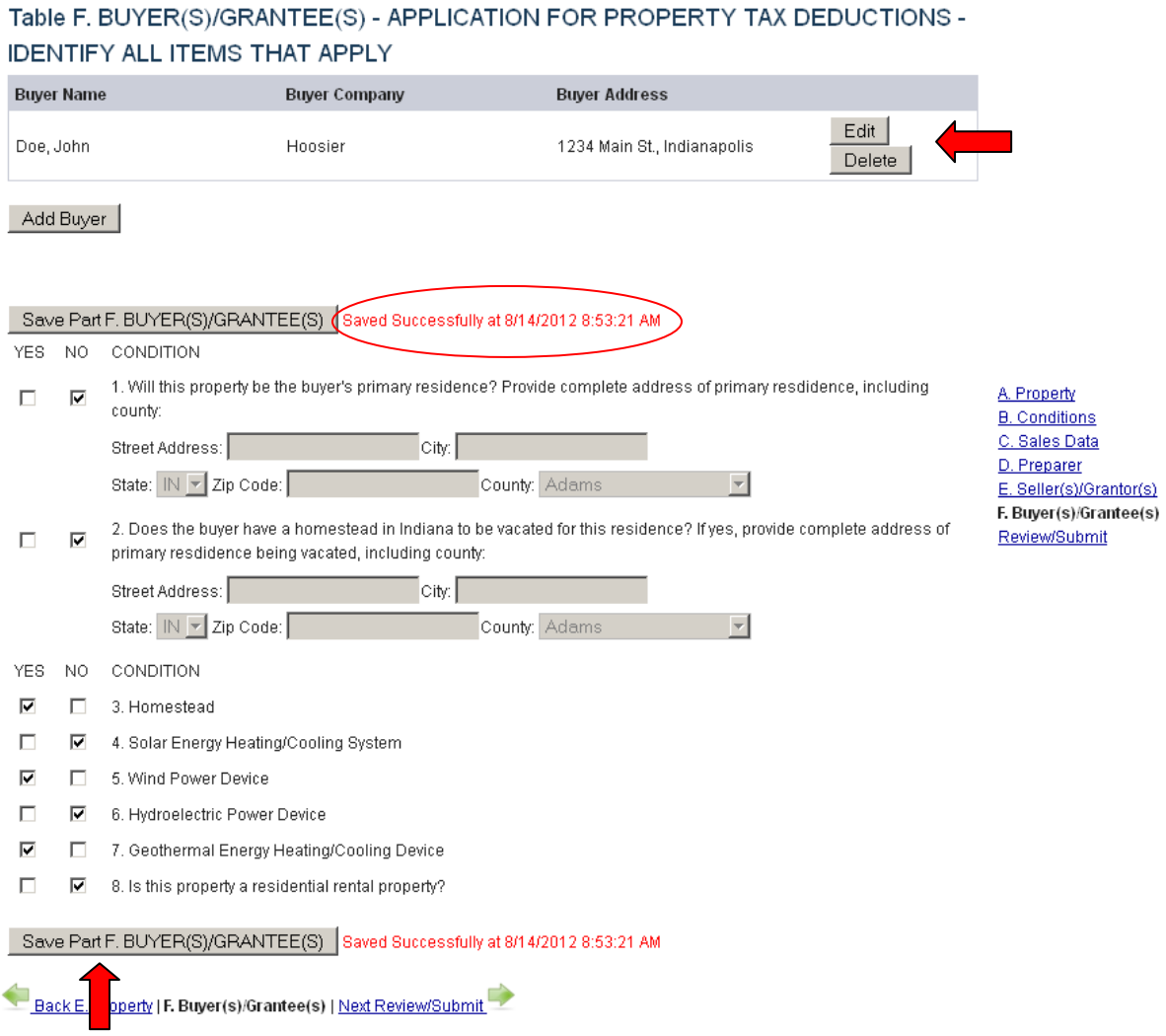
After clicking on the "Submit" button, users are redirected to a summary page of the seller's information. Here, users can "Edit" and/or "Delete" the information they have just entered. If there is more than one seller involved in this sale, another seller can be added to the SDF by clicking on the "Add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

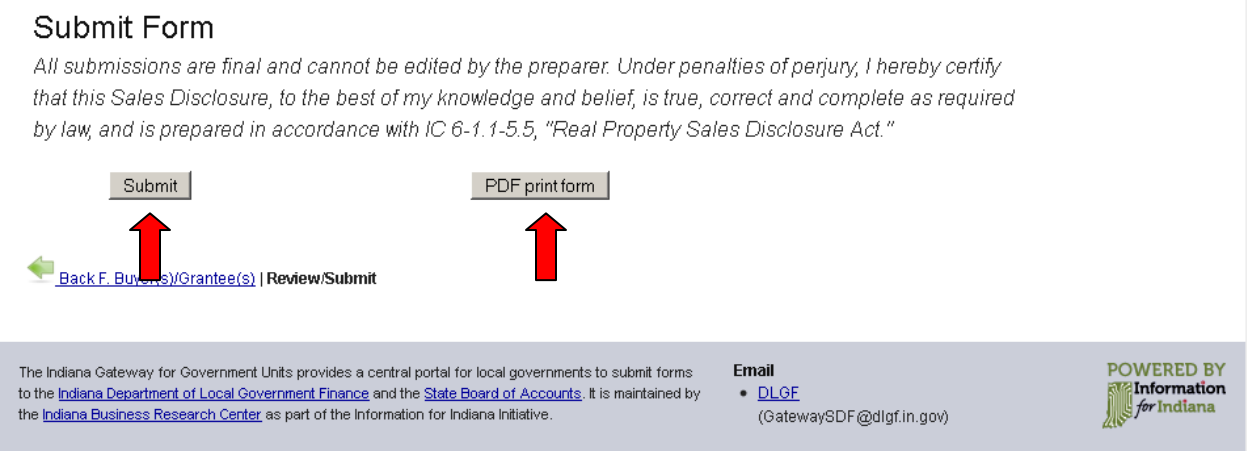


Please note that when a user saves the information in this section, a message will pop indicating, the information has been saved and the date and time in which this information was saved.

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.

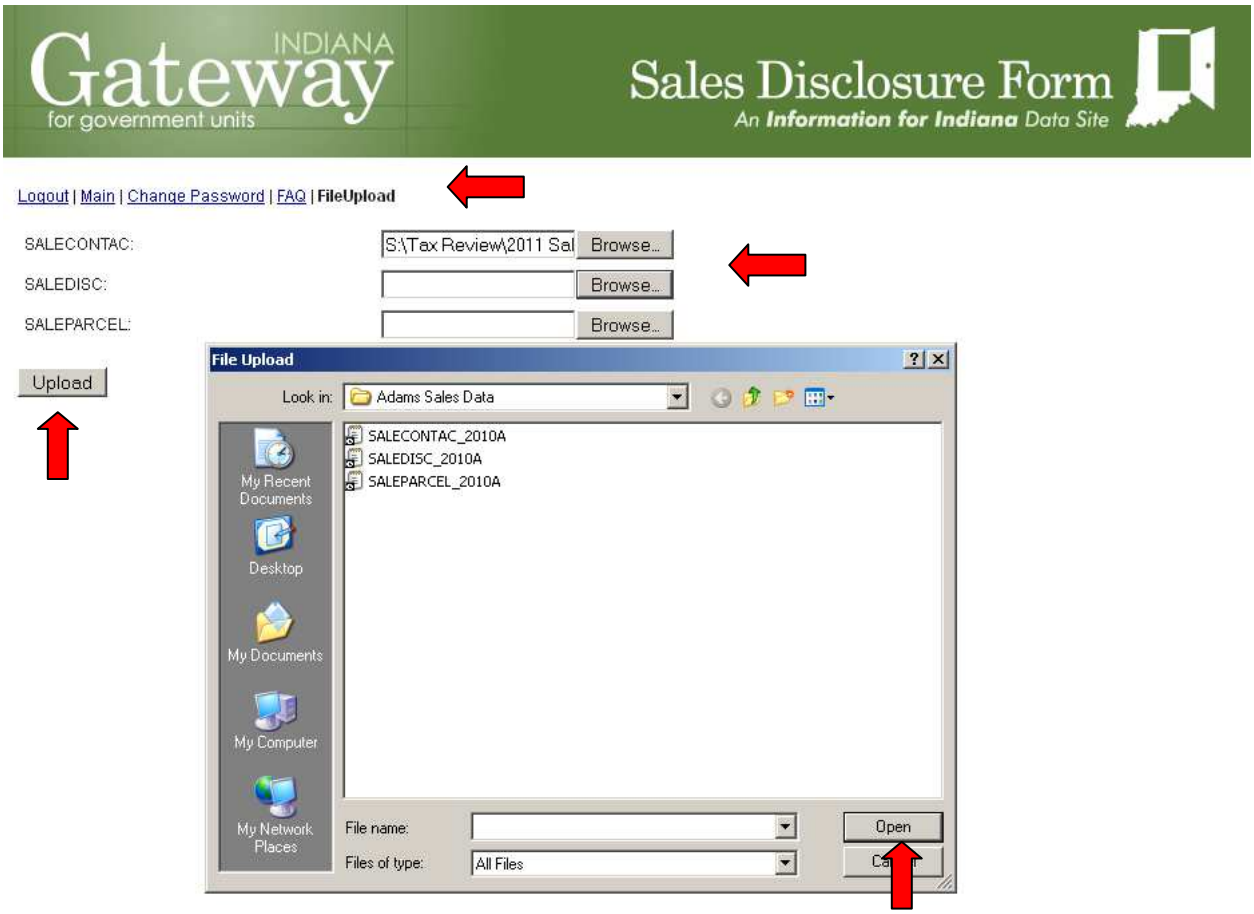
SDFs that have not yet been submitted will have a "No" under the Submitted column with the option to "Edit" or "Delete" those SDFs until they are officially submitted. Likewise, those that have been submitted will have a "Yes" and users will only be allowed to view the PDF of the submitted SDFs.

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).

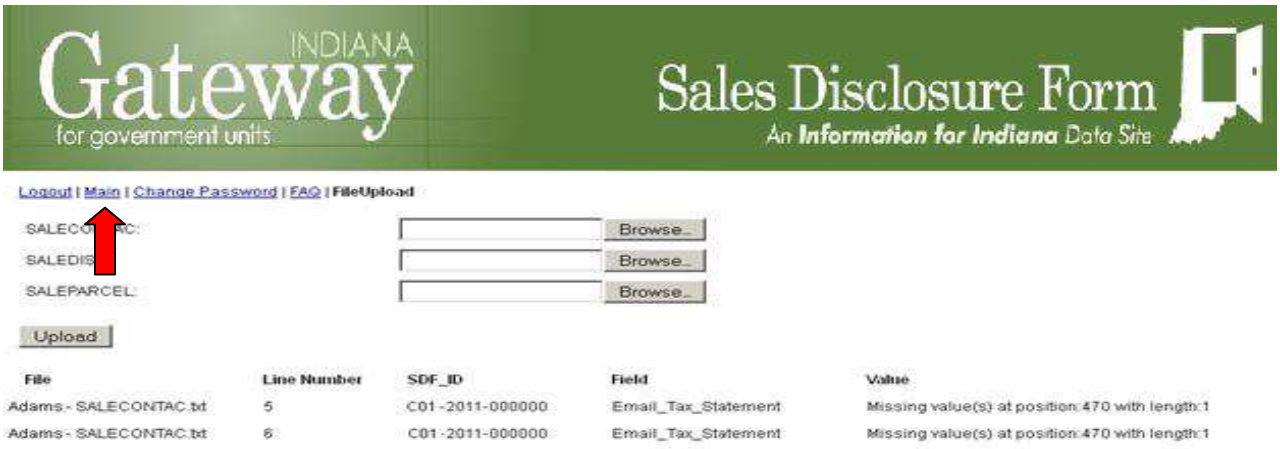
When all three files have been temporarily uploaded and the location and name of the sales file is in the field box, press the "Upload" button to officially upload all three files to Gateway SDF. If a user is missing a file, a red asterisk (*) will appear and the files will not upload.



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.



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.

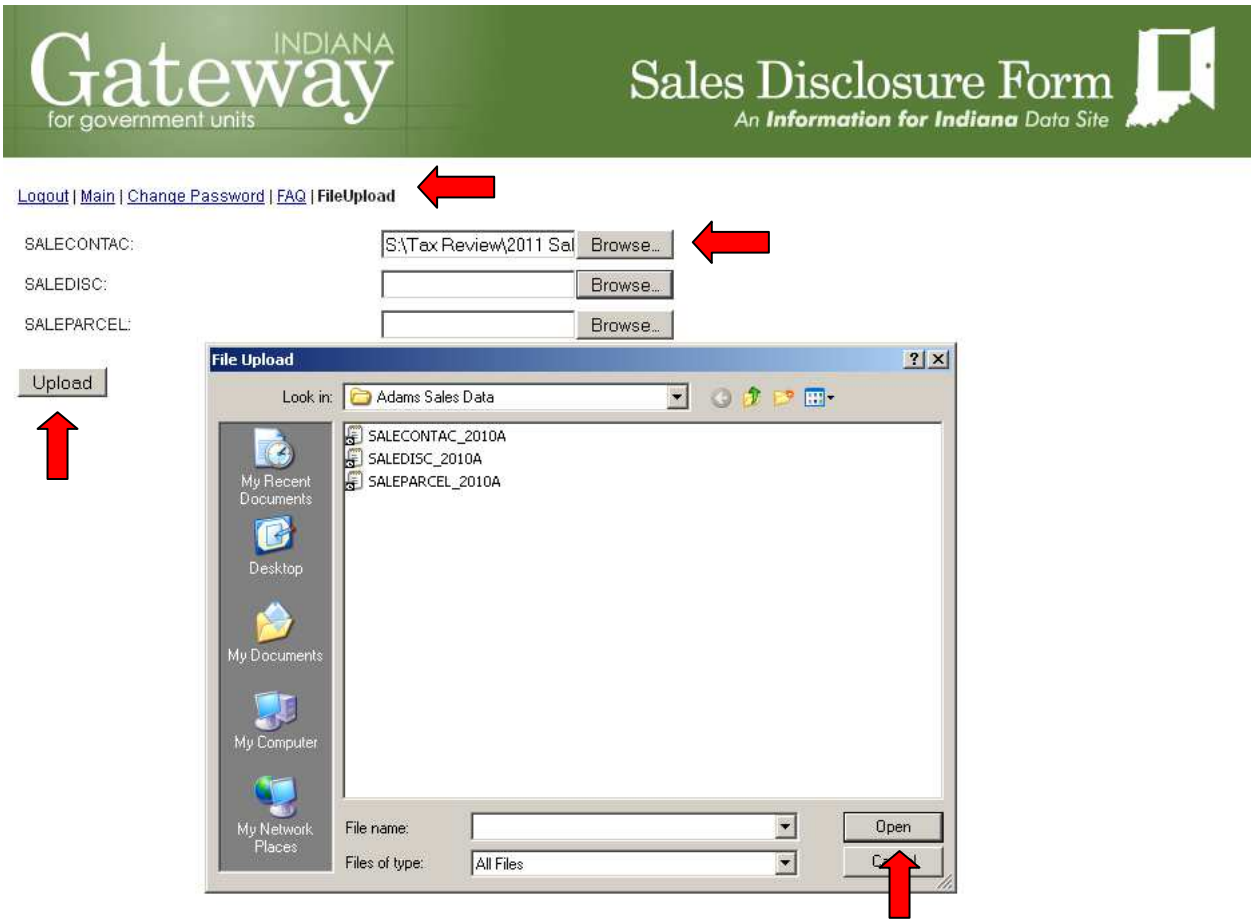
Role B – Vendor Counties File Upload

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).

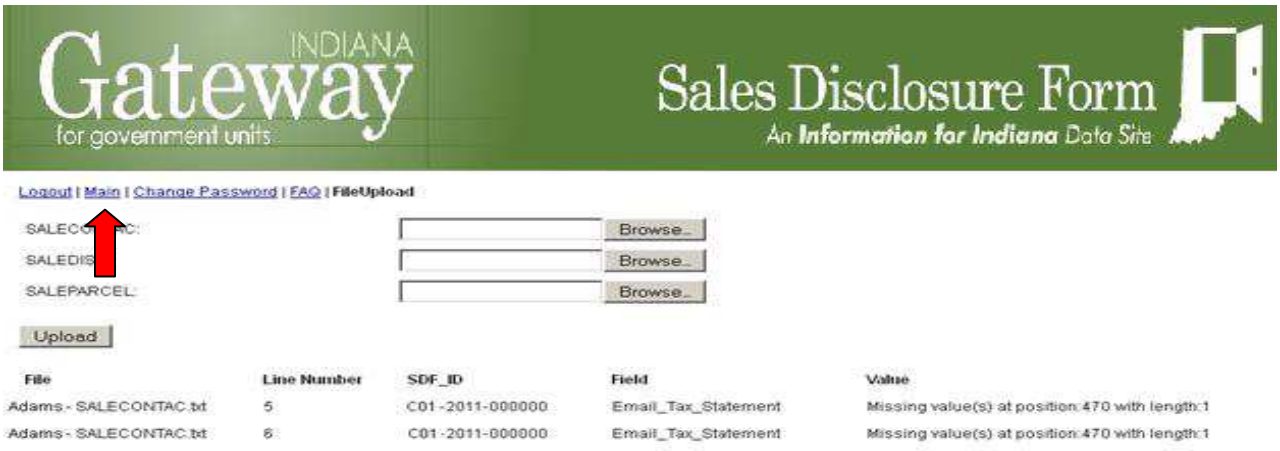
When all three files have been temporarily uploaded and the location and name of the sales file is in the field box, press the "Upload" button to officially upload all three files to Gateway SDF. If a user is missing a file, a red asterisk (*) will appear and the files will not upload.



Role C – Title Companies File Upload

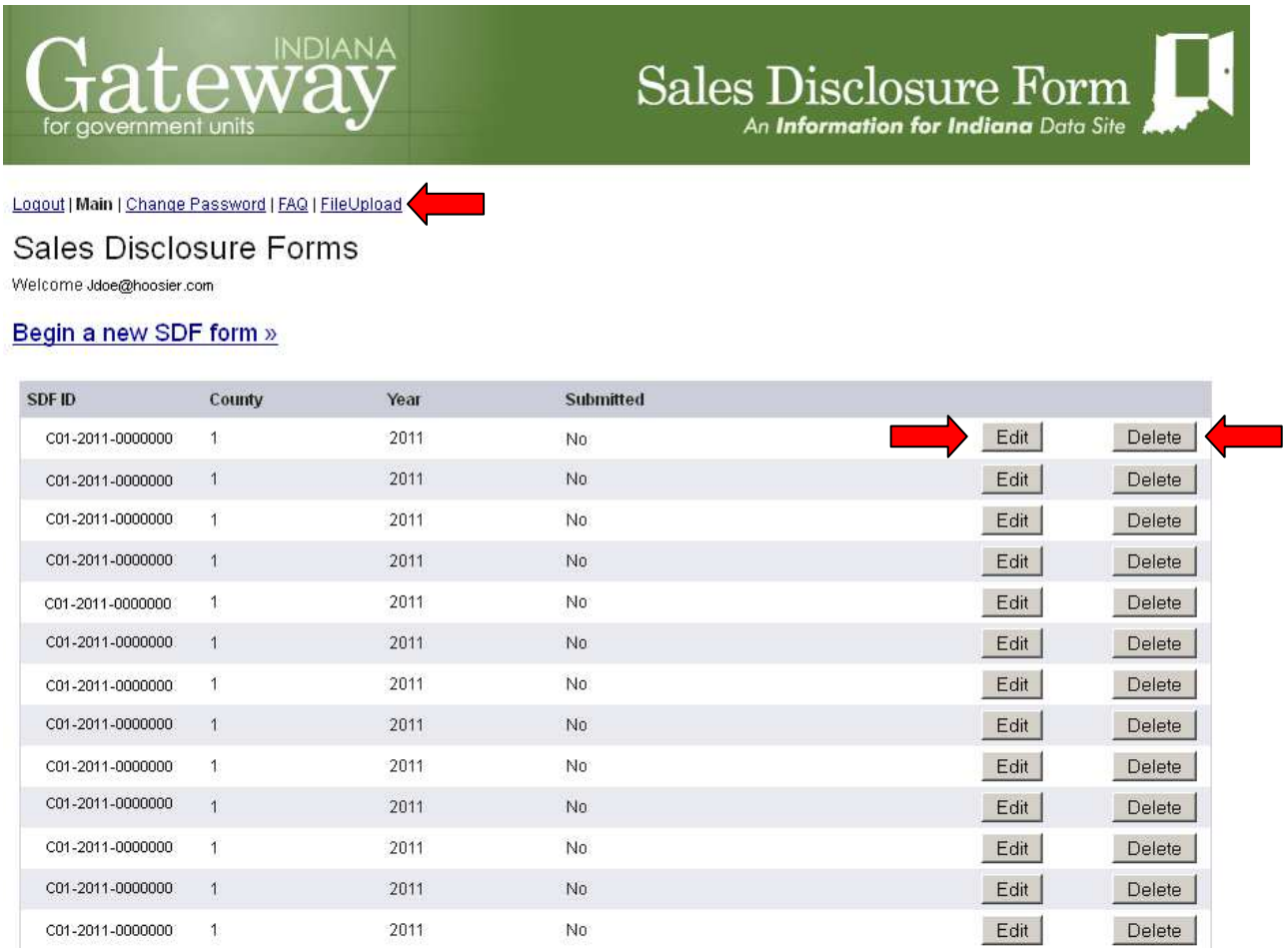
After the files have been uploaded, a total record count of the SDFs uploaded will appear at the bottom of the screen. In addition to the record count, there will be a list of records that have encountered an error while trying to upload. These records were not loaded into Gateway SDF.

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.



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.



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.

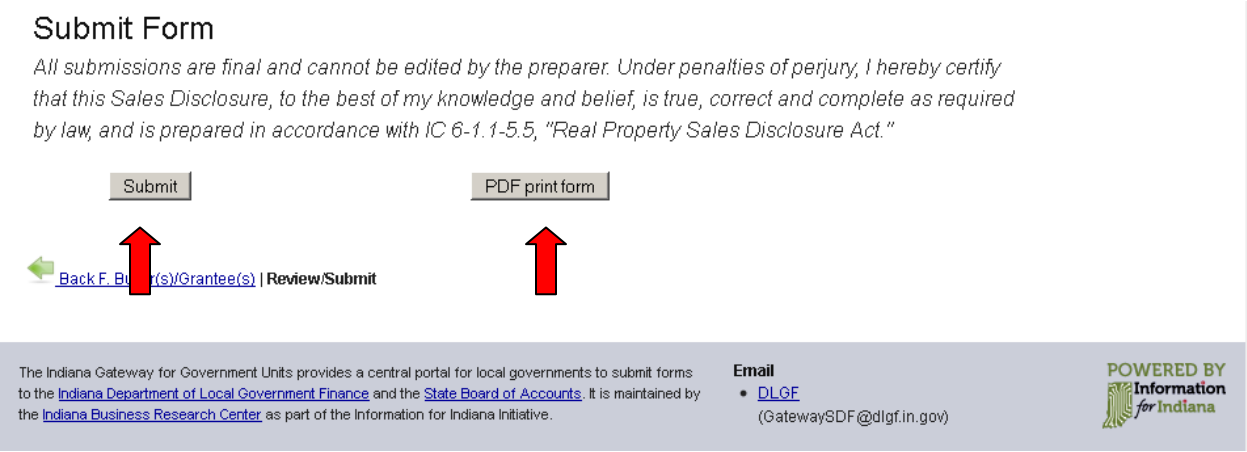
Role C – Title Companies File Upload

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.

Role C – Title Companies File Upload

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.

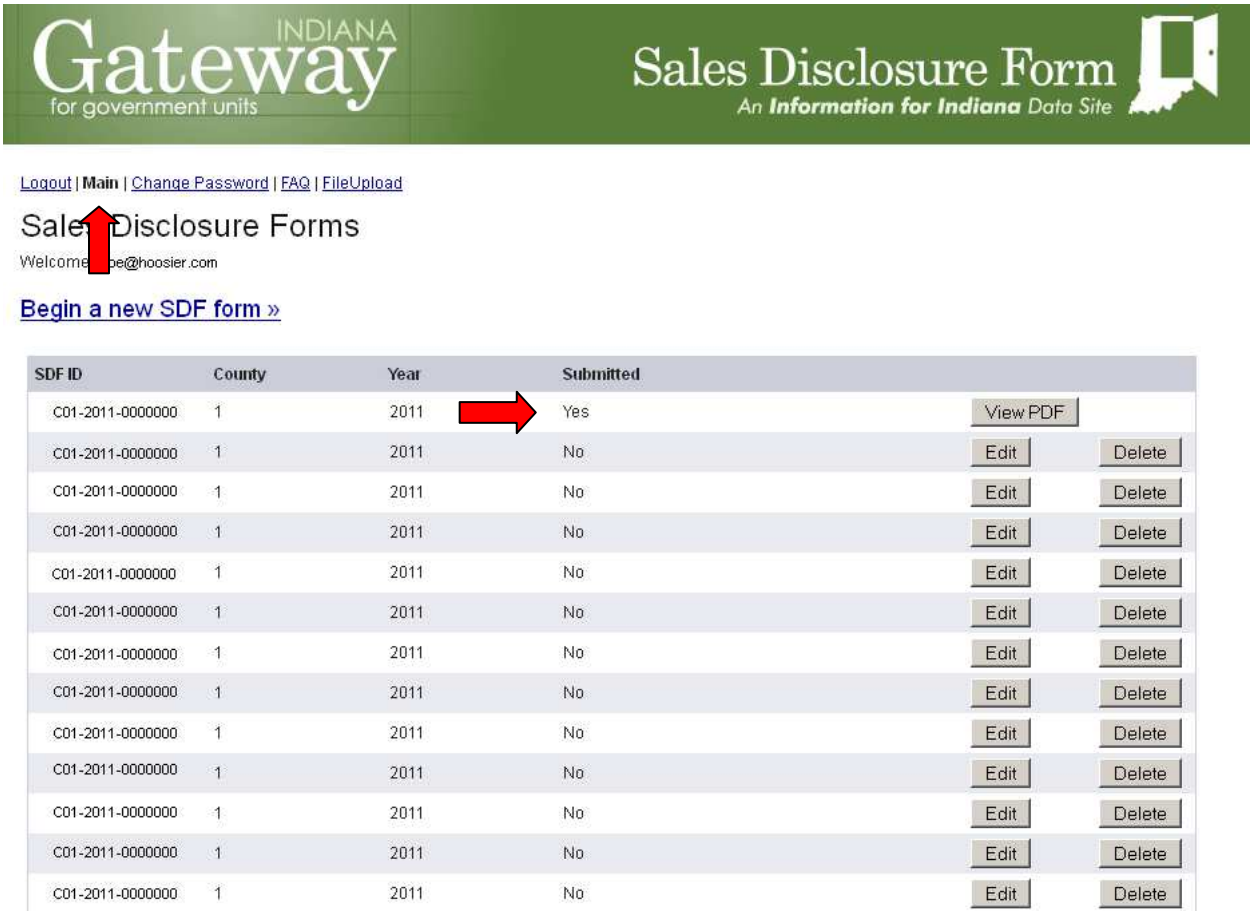
Role C – Title Companies File Upload

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.

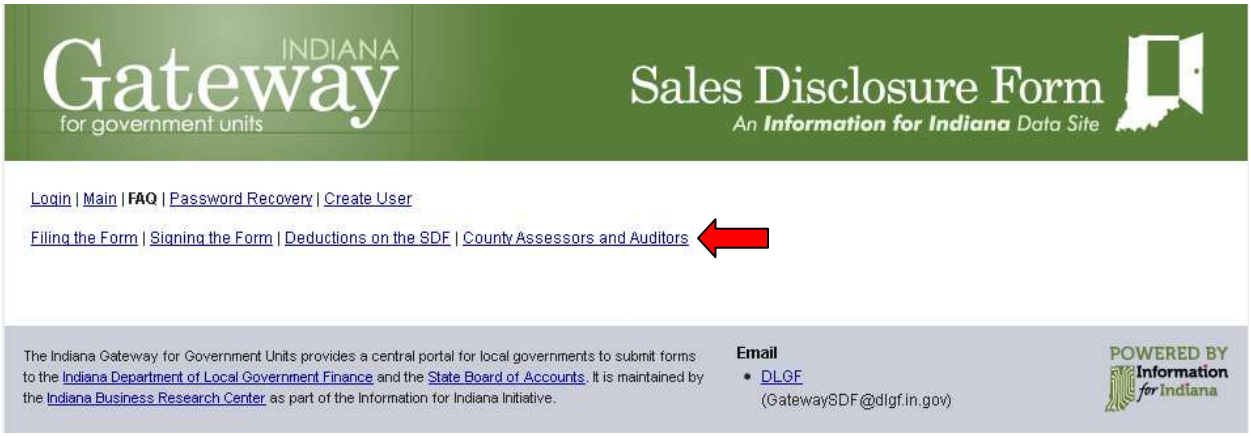


Role C – Title Companies File Upload

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.

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".



Resources

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.

Resources