



## State Comptroller's Office Updates

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## Agenda – Settlement Procedural Updates

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- Settlement submission procedures
  - Local Government FTP Site
- Direct communication during review
- Form 105 – Section C (Fines and Fees) Review Tool
- Excise Allocation Spreadsheet
  - Phase 1 – Update to Taxing District
  - Phase 2 – Update to Format



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## Agenda – Settlement Spotlight #1

- While Settlement largely refers to the validation of the State Forms & worksheets associated with property taxes, the Comptroller also uses it to ensure all State Remittances have been submitted.

Remittance Type	Submission Frequency	Next Date Due
Judges Supplemental Salary	Quarterly	November 1
Fines and Forfeitures	Semiannually	November 1
Fines and Fees	Semiannually	December 31
Excise (State Portion)	Semiannually	December 31



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## Agenda – Settlement Spotlight #2

- County will remit money in December to the Comptroller & State Board of Accounts (SBOA) – an increase in the frequency of the correct dollars being remitted to the incorrect agency.
  - When remitting funds related to the examination of records, the money will be sent to SBOA.
  - When remitting Settlement related activity (see previous slide), the money will be sent to the Comptroller & deposited on behalf of the appropriate agency.



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## Agenda – Comptroller External Website

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- Local Government Calendar
- Expanded information on:
  - State distributions to local government
  - State collections from the local government
- Settlement Forms & Worksheets
- Email, Memo & Instruction Manuals
- Presentation Materials

[www.in.gov/comptroller](http://www.in.gov/comptroller)



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## Agenda – Settlement Transition to Gateway

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- Comptroller's Office will continue implement ways to expedite the Settlement process, but a permanent solution is needed.
- While property & excise tax are reported in Gateway's DECAF application, Settlement is may be the largest portion of the tax bill cycle that is not available on Gateway for mass consumption.
- Transitioning Settlement to Gateway will simultaneously address issues of review speed & data availability.



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## Agenda – Settlement Transition to Gateway, cont.

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- While the Abstract project created a path for Settlement to move to Gateway, there are other challenges to be addressed:
  - Abstract was a single form, but Settlement requires the submission of multiple forms & worksheets for review & validation – how does this translate to an online submission?
  - Is this an opportunity for the templates for the State forms to be updated?
  - How will Settlement worksheets, like the Quietus worksheet, be incorporated into the review?



## Agenda – Settlement Transition to Gateway, cont.

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- Comptroller's Office is in the early stages of the multiyear project, but there are steps that we will be focusing on over the next few months.
  - Outreach to County Auditors, County Treasurers & other local government shareholders.
  - Engagement with all current tax & billing system representatives.
  - Discussions with associations, financial advisors & state agencies about new outputs related to Settlement related data.



## Agenda – Fund Consolidation Project

- Comptroller’s Office is partnering with SBOA & DLGF to create a proposal for a single, consolidated fund number structure.
- The proposal intends to:
  - Unite the budgeting & financial reporting (“AFR”) data under a single fund.
  - Create more consistency across all units.
  - Reduce the duplicative state reporting requirements & allow SBOA, DLGF & Comptroller to more effectively share data between agencies.



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# THANK YOU

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