

# Commonwealth of Massachusetts



# DLS

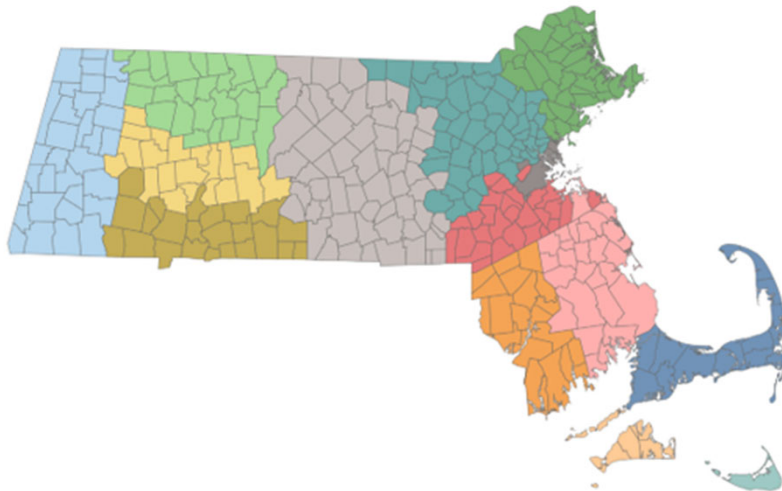
DIVISION OF LOCAL SERVICES  
MA DEPARTMENT OF REVENUE

Supporting a Commonwealth of Communities

---

Mass Clerks Association

February 3, 2022



Division of Local Services and City/Town Clerks Reporting Requirements ~ Presented By:

William Arrigal, Debt (Genius) Analyst  
Lisa Krzywicki, Deputy Bureau Chief, DARB



---

## Division of Local Services – Mission

---

### **The Division of Local Services (DLS) provides:**

- Technical Assistance
- Training
- Oversight to assist Massachusetts cities and towns in the achievement of sound and efficient fiscal management

### **DLS is responsible for:**

- Ensuring the fairness and equity of local property assessment and taxation
- The accuracy and quality of local accounting and treasury management
- Interpreting state laws that govern local finances
- Distributing local aid
- Maintaining a comprehensive databank on local finances

### **DLS has offices located in Boston, Worcester and Springfield**

- Like most of the world DLS staff began working remotely in March of 2020
- Officially this Spring we moved to a hybrid work model
- DLS is committed in assisting our local government partners, especially as we all come to terms with how the workplace is changing for us all



---

## DLS and the City and Town Clerks

---

- Welcome back to in-person presentations



Nice to see faces in person, instead of on screen!



- From DLS we have with us today
- What exciting news do we bring you from DLS?
- What are we going to talk about today?
- How can DLS continue to support clerks and other local officials with hybrid and non-hybrid work models



Please tell us what is this **EXCITING NEWS** is!

## Recent Changes to the DLS Team

- Retirements
- New Bureau Chiefs
- Additions to DLS Staff

## Rethinking how we Conduct Business for Manual Processes

- Electronic reporting using
  - Email
  - DLS Gateway Application - Enhancements
- Reviewing Notifications of Acceptance Reporting





---


## **DLS: What's on the Agenda?**

---

- **DA-82 Loan Authorization Report**
- **Proposition 2 ½ Ballot Questions**
- **Local Options Relating to Property Taxes**
- **Local Option Excise Taxes: Meals, Rooms, Cannabis and Short-term Rental Community Impact Fee**
- **Other Local Option Notifications**
- **Local Officials Directory (LOD)**
- **Local Account Administrators**
- **How to get help**



# DA-82 Loan Authorization Report

 **DLS**  
DIVISION OF LOCAL SERVICES  
MA DEPARTMENT OF REVENUE

Geoffrey E. Snyder  
Commissioner of Revenue

Sean R. Cronin  
Senior Deputy Commissioner

**DA-82 LOAN AUTHORIZATION REPORT**

Town/District: \_\_\_\_\_ At the Annual/Special/Regular  
Meeting called for \_\_\_\_\_ the following loan authorizations were voted:  
(Separate forms are required for each meeting)

Date	Article	Purpose	Amount Authorized	Vote Count **see note

NOTE: Vote count must be unanimous or an actual counted 2/3 majority or be a declared 2/3 majority provided that the Town has an approved by-law or town vote allowing such declared 2/3 majority. G.L. Chapter 39, Sec. 15, as amended by Ch. 448 of the Acts of 1996, and G.L. Chapter 44, Secs. 1, 7, and 8. Please attach a certified copy of the vote as passed. For contingent votes include the Ch. 39, Sec. 21C(5) debt exclusion results.

**Attested Copy of the Warrant:**  
Date Posted \_\_\_\_\_ Where? \_\_\_\_\_  
Date Published in Newspaper \_\_\_\_\_  
Date Warrant or Notice Mailed \_\_\_\_\_ To Whom? \_\_\_\_\_  
Date Finance/Advisory Committee meeting posted \_\_\_\_\_  
Were all additional local by-law requirements met? Yes \_\_\_\_\_ or No \_\_\_\_\_

**Quorum:**  
What is the Quorum requirement? \_\_\_\_\_  
Was a Quorum present on each day of the meeting? Yes \_\_\_\_\_ or No \_\_\_\_\_

**Was this an adjourned session? Yes \_\_\_\_\_ or No \_\_\_\_\_ (if no skip this section)**  
Date Posted \_\_\_\_\_ Where? \_\_\_\_\_  
Date Published in Newspaper \_\_\_\_\_  
Date Warrant or Notice Mailed \_\_\_\_\_ To Whom? \_\_\_\_\_  
Were all additional local by-law requirements met? Yes \_\_\_\_\_ or No \_\_\_\_\_

**Certification:**  
Is any vote listed on this form presently subject to referendum? Yes \_\_\_\_\_ or No \_\_\_\_\_  
If yes which one? \_\_\_\_\_  
Is litigation pending which could affect the validity of any vote? Yes \_\_\_\_\_ or No \_\_\_\_\_  
If yes which one? \_\_\_\_\_

*I hereby certify that this information is correct to the best of my knowledge.*

Date: \_\_\_\_\_, Town/District Clerk  
(Revised July 2021)

*Supporting a Commonwealth of Communities*  
mass.gov/dls  
email: [municipaldebt@dor.state.ma.us](mailto:municipaldebt@dor.state.ma.us)

In the next few slides, Bill will walk through how you should complete each of the sections of the DA-82 Loan Authorization Report, submit it to DLS and any supporting documentation that must be included



## DA-82 Loan Authorization Report

Let's Deconstruct the DA-82 and review it together

**DA-82 LOAN AUTHORIZATION REPORT**

Town/District: \_\_\_\_\_ . At the Annual/Special/Regular Meeting called for \_\_\_\_\_ the following loan authorizations were voted:  
(Separate forms are required for each meeting)

Date	Article	Purpose	Amount Authorized	Vote Count **see note

**NOTE:** Vote count must be unanimous or an actual counted 2/3 majority or be a declared 2/3 majority provided that the Town has an approved by-law or town vote allowing such declared 2/3 majority. G.L. Chapter 39, Sec. 15, as amended by Ch. 448 of the Acts of 1996, and G.L. Chapter 44, Secs. 1, 7, and 8. Please attach a certified copy of the vote as passed. For contingent votes include the Ch. 59, Sec. 21C(k) debt exclusion results.

Name of Town

Type of Meeting

Town/District: Our Town . At the Annual/Special/Regular

Meeting called for June 5, 2021 the following loan authorizations were voted:  
(Separate forms are required for each meeting)

Date	Article	Purpose	Amount Authorized	Vote Count **see note
6/5/2021	15	School Repairs	\$400,000	100/5

Information here should match Town Meeting Article

Borrowing Authorizations approved at Town Meeting

**NOTE:** Vote count must be unanimous or an actual counted 2/3 majority or be a declared 2/3 majority provided that the Town has an approved by-law or town vote allowing such declared 2/3 majority. G.L. Chapter 39, Sec. 15, as amended by Ch. 448 of the Acts of 1996, and G.L. Chapter 44, Secs. 1, 7, and 8. Please attach a certified copy of the vote as passed. For contingent votes include the Ch. 59, Sec. 21C(k) debt exclusion results.





# DA-82 Loan Authorization Report

Sample Town Meeting  
Warrant Article

Warrant articles included should match information in the first section of DA-82, show motions and results of the vote. Clerk must validate with "True Copy Attest", sign and include Clerks Official Seal

**ARTICLE 15: Dancing Bear SCHOOL DISTRICT NEW DEBT-MOHAWK TRAIL REGIONAL HIGH SCHOOL**

**Motion:** Ms. Moderator, I move that the Town vote to allow the Dancing Bear Regional School District to borrow a sum of money, not to exceed \$400,000 for work at Dancing Bear Regional School in OUR TOWN, Massachusetts, to include replacement of the heating boiler control system; resealing of parking lots; replacement of the fire alarm control panel and related sensors; replacement of/upgrades to certain domestic hot water heaters, condenser units, heating system hot water control valves, and freeze prevention system; construction of a second means of egress from the main electrical switchgear room; installation of additional safety railings to sections of the outside bleachers; replacement of the movable gymnasium partition; and replacement of floor covering in the library; and including costs incidental or related thereto, which purpose of the projects will materially extend the useful life of the school and preserve the asset capable of supporting the required educational program. Said sum is to be expended under the approval of the School Committee's Building Subcommittee, and to meet said appropriation, the District Treasurer, with the approval of the Chair, is authorized to borrow said sum under MGL Ch. 44 or any other enabling authority. This borrowing shall be subject to and contingent upon an affirmative vote of the Town to exempt its allowable share of the amounts required for payment of interest and principal on said borrowing from the limitations on taxes imposed by M.G.L. 59, Section 21C

*JAMES SMITH stated that OUR TOWN'S share of this debt, would be roughly \$151,000.*

**JAMES SMITH moved, DIANE JONES seconded, no discussion, voted and passed.....unanimously. Vote: Yeas-100, Nays -5, passed by 2/3 majority**

True Copy Attest:  
Joe Miller, Town Clerk  
^Clerks Official Seal

Moved: James Smith    Diane Jones, Second    Motion Approved 2/3 majority 100/5

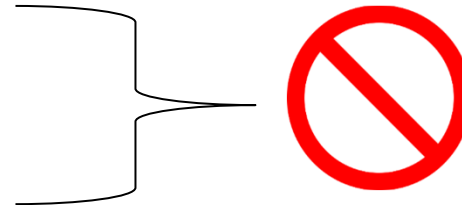




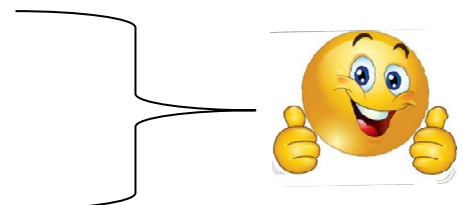
# DA-82 Loan Authorization Report

## Certify Information from Warrant

**Attested Copy of the Warrant:**  
Date Posted \_\_\_\_\_ Where? \_\_\_\_\_  
Date Published in Newspaper \_\_\_\_\_  
Date Warrant or Notice Mailed \_\_\_\_\_ To Whom? \_\_\_\_\_  
Date Finance/Advisory Committee meeting posted \_\_\_\_\_  
Were all additional local by-law requirements met? Yes \_\_\_ or No \_\_\_

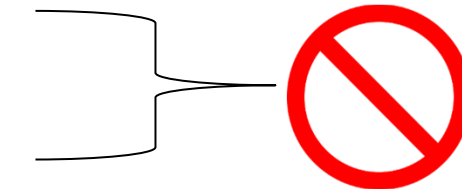


**Attested Copy of the Warrant:**  
Date Posted 5/20/2021 Where? Post Office, Public Library  
Date Published in Newspaper N/A  
Date Warrant or Notice Mailed N/A To Whom? N/A  
Date Finance/Advisory Committee meeting posted \_\_\_\_\_  
Were all additional local by-law requirements met? Yes X or No \_\_\_

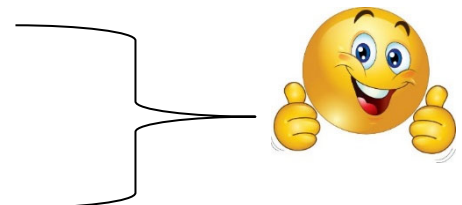


## Complete Quorum Information

**Quorum:**  
What is the Quorum requirement?  
Was a Quorum present on each day of the meeting? Yes \_\_\_ or No \_\_\_



**Quorum:**  
What is the Quorum requirement? 7  
Was a Quorum present on each day of the meeting? Yes x or No \_\_\_





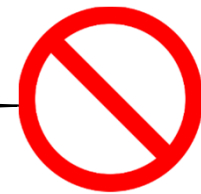
# DA-82 Loan Authorization Report

## Clerk Certification

**Certification:**  
Is any vote listed on this form presently subject to referendum? Yes \_\_\_\_ or No \_\_\_\_  
If yes which one? \_\_\_\_\_  
Is litigation pending which could affect the validity of any vote? Yes \_\_\_\_ or No \_\_\_\_  
If yes which one? \_\_\_\_\_

*I hereby certify that this information is correct to the best of my knowledge.*

Date: 6/9/2021 Me the clerk, Town/District Clerk



**Certification:**  
Is any vote listed on this form presently subject to referendum? Yes x or No \_\_\_\_  
If yes which one? 1  
Is litigation pending which could affect the validity of any vote? Yes \_\_\_\_ or No x  
If yes which one? \_\_\_\_\_

*I hereby certify that this information is correct to the best of my knowledge.*

Date: 6/9/2021 Me the clerk, Town/District Clerk





## DA-82 Loan Authorization Report

# SUCCESS

Okay what's next?



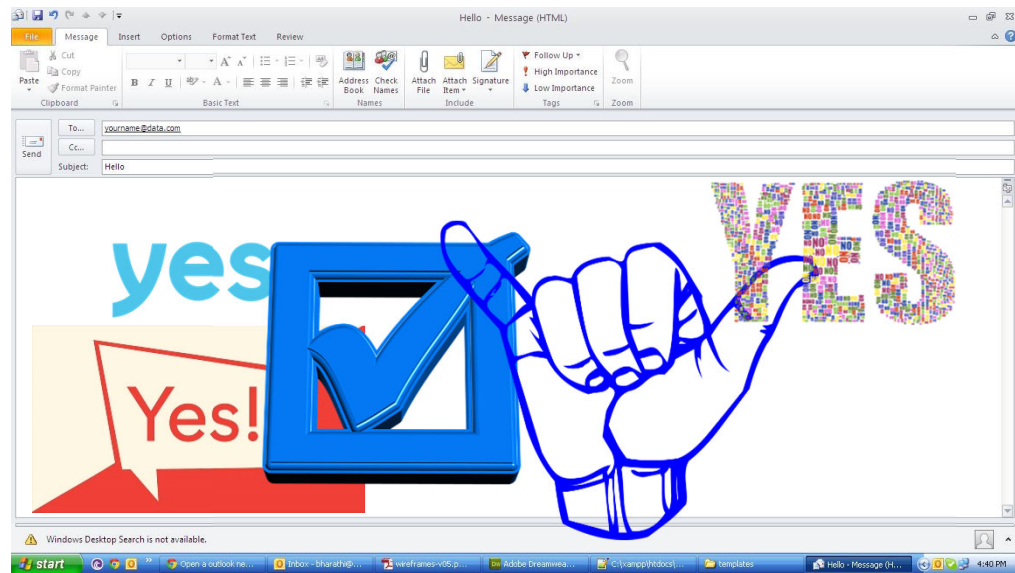
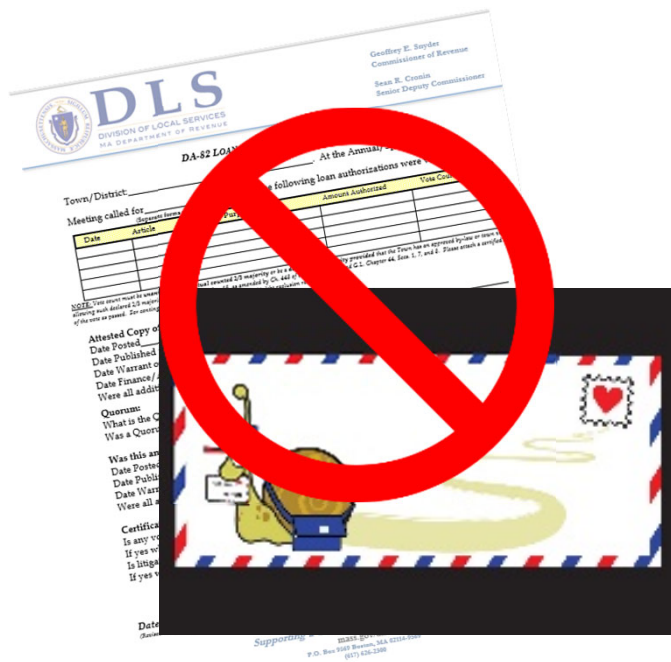
EMAIL

Where?

[municipaldebt@dor.state.ma.us](mailto:municipaldebt@dor.state.ma.us)



# DA-82 Loan Authorization Report





---

## DLS: Clerks Letter

---

### **Borrowing Authorizations**

Clerks (including regional school district personnel) are required to send certified copies of all debt authorizations to the Director of Accounts **within 48 hours** after the vote becomes effective.

The votes must be declared passed by a unanimous vote or an actual counted 2/3rds majority or by a “declared 2/3rds majority.” If a vote is contingent upon a Proposition 2½ debt exclusion, it does not become effective until the exclusion is approved by the voters. Certified election results for the debt exclusion must also be submitted with a contingent vote to authorize debt.

DA-82 Loan Authorization Report. In addition to the statutory reporting requirements, the Bureau of Accounts requires form DA-82 except from cities. The purpose of the DA-82 is to ensure that debt authorizations occurred at a duly called, valid town or district meeting that complied with charter, by-law and other legal requirements. [Form DA-82](#) can be found on the Bureau of Accounts’ website.

**Please email the DA-82 with the certified votes to [municipaldebit@dor.state.ma.us](mailto:municipaldebit@dor.state.ma.us).**  
**Please do not mail these forms.**



---

## **DLS: Proposition 2 ½ Ballots**

---

- **Types of Proposition 2 ½ ballot questions**
  - **Override/Underride**
  - **Debt Exclusion**
  - **Capital Expenditure Exclusion**
  - **Capital Stabilization Fund Override**
- **Reporting Requirements**
- **Additional Reporting for Capital Stabilization Fund Overrides in subsequent years**
- **Why is it important we submit results quickly**





---

## DLS: Clerks Letter

---

### Proposition 2 1/2 Questions

Please send specimen ballots with certified election results for all Proposition 2½ questions voted this year. Your submission should include votes that have passed **and** failed and clearly indicate the purpose and type of vote (override, underride, debt exclusion or capital expenditure exclusion). These votes should be emailed to the Data Analytics and Resources Bureau at [databank@dor.state.ma.us](mailto:databank@dor.state.ma.us). Missing or incomplete documentation may cause a delay in certifying your community's annual tax rate.

Please indicate municipal capital stabilization fund overrides per G.L. chapter 59, § 21C(g) separately. See DLS [IGR 17-20](#).

**Also, we ask that the form of ballot question votes indicate dollar amounts rounded to whole dollars, as the levy limit form will not accommodate decimals.**





---

## DLS: Local Options

---

- **Local Options Relating to Property Taxes**

Billing Cycle	Assessment on New Construction (Ch653) Adopted Yr	Assessment on New Construction (Ch653) Yr Rescinded	Hopkinton Supplemental Tax Assmnt Date Rescinded	Residential Exemption Percentage	Small Commercial Exemption Percentage	Open Space Discount Percentage	Personal Property Exemption Amount	Brownfields Environmental Tax Date Accepted	Chapter 61A Year Adopted	Chapter 61B Year Adopted	Chapter 61 Year Adopted	Research and Development Date Accepted
---------------	---	---	--	----------------------------------	---------------------------------------	--------------------------------	------------------------------------	---	--------------------------	--------------------------	-------------------------	--

- **This report appears on our website from this page:**

<https://www.mass.gov/service-details/local-options-relating-to-property-taxation-cpa-meals-and-room-occupancy>

- **Other Local Option Notifications**  
**For accounting practices**

- [Tax Title Collection Revolving Fund, Chapter 60, §15B](#)
- [Dedication of Revenue to Stabilization Fund, Chapter 40, § 5B](#)
- [PEG Access and Cable Related Special Fund, Chapter §53F<sup>3</sup>/<sub>4</sub>](#)
- [Special Injury Leave Indemnity Fund, Chapter 41 § 111F](#)



---

## **DLS: Local Options**

---

- **Local Option Excise Taxes: Meals, Rooms, Cannabis and Short-term Rental Community Impact Fee**
  - **Room Occupancy Transfers (up to 6%)**
  - **Short-term Rental Community Impact Fee (up to 3%)**
  - **Cape & Islands Water Protection Fund (2.75%)**
  - **Sales of Meals (.75%)**
  - **Adult Use Retail Marijuana Sales (up to 3%)**



---

## **DLS: Local Options – Room Occupancy Transfers**

---

- MGL C. 64G, § 6A allows for an additional tax to be applied to all room occupancy transfers
- December of 2018 Governor Baker signed into law amendments to the room occupancy to expand the definition of room occupancy transfers to include short-term rentals (STR), created the short-term rental impact fee and the Cape & Islands Water Protection Fund to be effective July 1, 2019
- Traditional lodging houses were already registered in the DOR MassTax Connect system for reporting taxes, but now owners of STR are also required to register and obtain a certificate from DOR.
- Many STR's are managed by Airbnb and like companies, property owners are required to include the certificate with their registration with any of these companies.
- Room Occupancy excise returns are filed on a monthly basis through Mass Tax Connect and payments made to the community are done on a quarterly basis.



---

## DLS: Local Options – Room Occupancy Transfers

---

- Community Impact Fee on STR's Requirements for adoption
  - If imposing the Room Occupancy Excise under MGL c. 64G, §6A and wants to adopt the Community Impact Fee
    - › Clerk should prepare two warrant articles
      - » Article 1 - MGL c. 64G, § 3D(a) vote to impose a local option fee on STR room occupancy transfers for “professionally managed unit”
      - » Article 2 – MGL c. 64G, § 3D(b) vote to impose a local option fee on STR room occupancy transfers in 2-3 family homes that includes the operator's primary residence
    - › If Article 1 fails, Article 2 is assumed to fail as well
  - If *not* imposing the Room Occupancy Excise under MGL c. 64G, §6A and wants to adopt the Community Impact Fee
    - › Clerk should prepare three warrant articles
      - » Article 1 – vote to impose local option excise on room occupancy transfers
      - » Articles 2 & 3 would be the same as above
    - › If Article 1 fails it assumed that Articles 2 & 3 fail as well



---

## DLS: Local Options – Room Occupancy Transfers

---

First Local Option Community Impact Fee (G.L. c. 64G, § 3D(a)) - The first local option community impact fee is adopted under G.L. c. 64G, § 3D(a) and applies to each transfer of occupancy of a “professionally managed unit,” which is defined as one of two or more short-term rental units in same city/town not located within a single- or two- or three-family dwelling that includes the operator’s (owner’s) primary residence. The fee applies to transfers of occupancies on or after July 1, 2019 for which a rental contract was entered into on or after January 1, 2019. It does not apply to occupancies for which the rental contract was entered into before January 1, 2019. For example, if a summer vacation rental was booked last summer (or at any time before January 1, 2019), the local option community impact fee will not apply.

Second Local Option Community Impact Fee (G.L. c. 64G, § 3D(b)) - If the city/town has voted to adopt the local option community impact fee described above for “professionally managed units” under G.L. c. 64G, § 3D(a), it may by a separate additional vote, adopt the local option community impact fee on short-term rental units located within a two- or three-family dwelling that includes the operator’s primary residence under G.L. c. 64G, § 3D(b). The impact fee will, again, apply only to transfers of occupancies on or after July 1, 2019 for which a contract was entered into on or after January 1, 2019. If the city/town has not adopted the local option community impact fee under G.L. c. 64G, § 3D(a) (above), it cannot adopt the local option community impact fee under G.L. c. 64G, § 3D(b).



---

## DLS: Local Options – Sales on Meals

---

- MGL C. 64L, § 2(a) allows for an additional tax to be applied to the sales of meals
- Effective for sales of restaurant meals on or after October 1, 2009, of .75% returns are filed monthly and payments are made to communities quarterly
- Tax is imposed on where the food is sourced
  - Town A does impose the local option tax
  - Town B does *not* impose the local option tax
    - › Resident in town B orders pizza from a restaurant in town A local option tax will be imposed – additional tax will go to town A
    - › Resident in town A orders pizza from a restaurant in town B no local option tax will be imposed
  - Catering company located in a town that impose local option tax, wedding held in town that doesn't impose the tax – Couple will be charged the local option tax – additional tax will go to the town where the food was prepared
  - Canteen truck starts food in town that imposes local option tax but delivers meals across communities that do and don't impose the tax, every meal should include the additional tax – additional tax will go to the town where the food was prepared
  - Food trucks and food providers at fairs should register with all communities they will be doing business in and if the additional tax is imposed should file a return for each location



---

## DLS: Local Options – Adult Use Recreational Marijuana

---

- MGL C. 64N, § 3 allows for an additional tax to be applied to the retail sale of marijuana for adult use, effective on or after July 1, 2018
- Local option can be up to 3% of gross sales
- Excludes medical marijuana
- Gross sales, state excises and taxes and local option taxes returns are filed monthly, and payments to communities are made quarterly
- Local option tax is different than the local host agreement, host agreements are negotiated between the marijuana retailer and community directly and all host agreement payments are made directly from the retailer to the community
- Sales were just expanded to include delivery service; DOR is working with the Cannabis Control Commission (CCC) on updated DOR Regulations to include delivery service but are not final yet





---

## DLS: Local Options

---

- **If there is a vote to approve a local option adoption, you can check to see if you need to submit it us on the DLS website at:**  
<https://www.mass.gov/service-details/notification-of-acceptance-of-local-option-statutes>
- Also included as a hand-out are all the current forms, but it is important to check the website for new local options
- One of the best ways local governments can stay informed about changes in MGL, new requirements, new local options or general information is to subscribe to the DLS Alerts subscriber list, you can do so from the DLS homepage – [www.mass.gov/dls](http://www.mass.gov/dls) or Melissa and Tracy from my team have sign-up sheets and names will be added tomorrow



---

## DLS: Clerks Letter

---

### Local Options

Please send any local option votes that require notification to DLS (e.g. adoption of the Community Preservation Act, quarterly tax billing, meals excise, room occupancy excise, and marijuana excise) to the Data Analytics and Resources Bureau at [databank@dor.state.ma.us](mailto:databank@dor.state.ma.us).



## DLS: LOD and Gateway Administrators

Tracking Certification Taxrate Balance Sheet Schedule A District Taxrate District Balance Sheet LA-3 Misc Forms MDM Directory Licensee Provider Legal Other Apps Corp Book TAB Security Admin

Help | My Profile | Logout  
Logged In: Lisa Krzyz  
Last Logged In: 7/31/2021 8:18:53

### Directory

#### Local Officials Directory

**FAQ's**

**Question**

- ▶ Does taking Course 101 online satisfy the requirement established in CMR 88.3.17?
- ▶ I need to take Classification Training. Is that available online?
- ▶ Whom do I contact if I need help with Course 101?
- ▶ Who maintains the Local Officials Directory?
- ▶ Who is listed in the Local Officials Directory?

**Searching Local Officials Directory**

You can search for officials using a number of criteria. Use any combination of drop-down lists and text boxes to specify exactly what you're looking for.

- Select one or more jurisdictions by clicking in the Jurisdiction drop down list. All cities, towns, counties, utility/special purpose districts and regional school districts are included in the Jurisdiction list by default. You can select the Jurisdiction Type to narrow the Jurisdiction list to a specific type if desired.

Type a complete or partial position or name in the applicable box, and Gateway will find all records associated with the jurisdiction(s) you selected. Please note that if a utility or special district is selected, only active officials are displayed by default. Please note that this search option is for public use.

City and Town Clerks are responsible for maintaining the local officials directory to reflect all changes in the community officials

WHY?

Clerks are in the best position to know when changes in staff happen since many are driven by election results

Why is it so important?

- Local officials are notified of Gateway approvals based on email address in the LOD
- Special mailings regarding Coronavirus Relief and the ARPA funds use these emails
- Gateway authentication is created using the LOD



## DLS: LOD and Gateway Administrators

Enter Information  
relating to person

<b>Person Information</b>	
Position	<input type="text" value="Town Clerk"/>
Functional Role	<input style="border: 1px solid #ccc;" type="text" value="City Clerk/Town Clerk"/>
Salutation	<input style="border: 1px solid #ccc;" type="text" value="--Select a Salutation--"/>
First Name	<input style="border: 2px solid red;" type="text"/>
	<small>First Name is required.</small>
Middle Name	<input type="text"/>
Last Name	<input type="text"/>
Suffix	<input type="text"/>
Department Head	<input checked="" type="radio"/> Yes <input type="radio"/> No
Is Active	<input checked="" type="radio"/> Yes <input type="radio"/> No



## DLS: LOD and Gateway Administrators

Enter address, phone numbers and email  
*Mobile number is not required*

**Official Address Information**

Address 1

Address 2

Address 3

City

State  Zip  -

**Official Phone Information**

Main Phone  Ext

Alt Phone  Ext

Fax

Mobile

**Official Website and Email Information**

Web Site ([click here to launch](#))

Official / Unofficial  Official  Unofficial

Email ([click here to send](#))



---

## DLS: LOD and Gateway Administrators

---



Enter election or appointed information

**Elected / Term Information**

Elected / Appointed Info  Elected  Appointed

**Election Date**  
--Select Election Date-- ▾

**Appointed Date**  
05/18/2020

**Term Expires On Date**



## DLS: LOD and Gateway Administrators

When you update a person in the directory and click save this box will appear, how you respond is very important.

If the information you entered is for a person replacing an existing local official, click **ADD NEW**

If you are correcting an error of fixing an email address in an existing official, click **CORRECT**

### Save Person

Are you adding a newly elected or appointed official to Directory, or are you correcting the data of an existing official?

Click 'Add New' to inactivate the previous official and activate the new official. Click 'Correct' if you are correcting or adding data to an existing official's record. Click 'CANCEL' to discard all changes.

Add New

Correct

Cancel

Where all guilty of not reading information in the pop-up boxes, but on this one following my instructions will save you and the person a lot of frustrations.





---

## DLS: LOD and Gateway Administrators

---

- Generally, clerks in most communities and sometimes an IT Director or other person has the rights to edit and create user accounts for Gateway rights
- Through the security module you can create or modify account permissions
- If the community has a new accountant, the previous accountant's permissions should not be used, a new account should be created



---

## DLS: LOD and Gateway Administrators

---

- If you followed the directions on the previous slide for changing an official in the directory their Gateway account was removed, and you will be able to create a new account
- You create the username, rule of thumb last name and first initial, however, some officials had an account in the previous community. In those cases, you will need to try some variation of the first and last name
- Password Requirements:

### Gateway User Account Policies

Gateway passwords must conform with a "**strong password**" policy by meeting the following requirements:

- 8 character minimum length, 20 character maximum length
- contain at least 1 upper case letter
- contain at least 1 lower case letter
- contain at least 1 number
- contain at least 1 special character (!@#%&\*-\_)

Do not, just don't, no matter what they say should the password include a space



## DLS: LOD and Gateway Administrators

How can I find out who the local admin for my community is?

Click Forgot User Name?

### Obtain User Name

Select your Jurisdiction and contact the administrator to obtain a User Name

Jurisdiction

When you click go the page will add the name and telephone number in the directory of the local admin.

### Obtain User Name

Select your Jurisdiction and contact the administrator to obtain a User Name

Jurisdiction

#### Administrators

- Scheid, Harald : 978-422-8111

### LOG IN

Enter your User Name and Password.

User Name

Password

Password is case-sensitive

[Forgot password?](#)

[Forgot user name?](#)

System times out after 30 minutes without use. Login again to continue.

Want to Become an Authorized User?

DLS Gateway is restricted to elected and appointed municipal officials. To learn more about how to become an authorized user, please [click here](#)



## DLS: How to get help?

DA-82 Loan Authorization Report	Bill Arrigal	<a href="mailto:municipaldebt@dor.state.ma.us">municipaldebt@dor.state.ma.us</a>
Proposition 2 1/2 Ballot Questions	Data Analytics & Resources Bureau	<a href="mailto:databank@dor.state.ma.us">databank@dor.state.ma.us</a>
Legal Question regard Prop 2 1/2	Bureau of Municipal Finance Law	<a href="mailto:dslaw@dor.state.ma.us">dslaw@dor.state.ma.us</a>
Local Option Notifications	Data Analytics & Resources Bureau	<a href="mailto:databank@dor.state.ma.us">databank@dor.state.ma.us</a>
Specific Questions - Local Options	Lisa Krzywicki	<a href="mailto:databank@dor.state.ma.us">databank@dor.state.ma.us</a>
DLS Gateway Application	Data Analytics & Resources Bureau	<a href="mailto:dlsgateway@dor.state.ma.us">dlsgateway@dor.state.ma.us</a>
Directory Update Questions	Data Analytics & Resources Bureau	<a href="mailto:dlsgateway@dor.state.ma.us">dlsgateway@dor.state.ma.us</a>

***Using the above contact information will ensure your reporting gets to the appropriate person right away***