

# DOC ↔ Link



## USER GUIDE

Fairfield County Auditor's Office  
[localgovsupport@fairfieldcountyohio.gov](mailto:localgovsupport@fairfieldcountyohio.gov)

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# What is DocLink?

DocLink is a submission management system to simplify processes, automate workflows, and support organizational compliance, making it easier for you to work with the Auditor's Office.

## DocLink Navigation


### Home

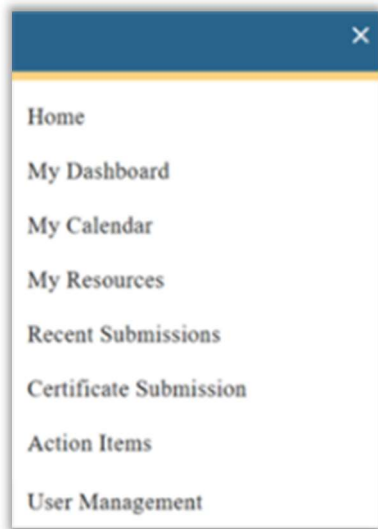
Link to DocLink: <https://doclink.fairfieldcountyohio.gov/home>

Once logged into DocLink, you land on the home page. On the Home page, you'll see several items:

- 1) Menu (top left corner)
- 2) Your username and role (top middle)
- 3) Change Password (top right corner)
- 4) Logout (top right corner)
- 5) Link to the Fairfield County Auditor's office website (bottom right corner)



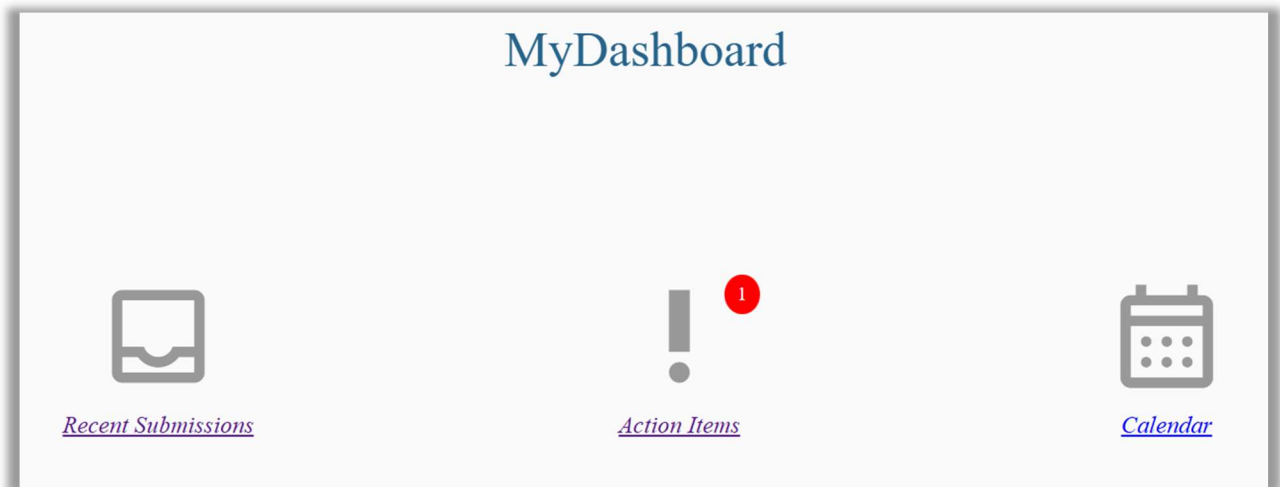
Click the  menu to see the navigation pane:



**NOTE:** Depending on your role type, you may see more/less menu items.

## My Dashboard

My Dashboard displays several navigation options:



If there is a red bubble with a number in it by “Action Items”, this means there’s a certificate that either has not been submitted or has been returned and needs corrected. For more information on Action Items, refer to the Action Items section.

## Recent Submissions

Recent Submissions displays all recently submitted certificates. Here, you can see the status of the certificates and view them as well.

Tax Authority Name	Status	Year	Version	Actions
Liberty Union - Thurston L.S.D	On Packet	2025	Resource: v2	<a href="#">View</a>
Liberty Union - Thurston L.S.D	Approved By BC	2026	Resource: Initial	<a href="#">View</a>
Liberty Union - Thurston L.S.D	Draft	2024	Appropriation: Initial   Resource: v3	<a href="#">View</a>
Liberty Union - Thurston L.S.D	Approved	2025	Initial	<a href="#">View</a>
Liberty Union - Thurston L.S.D	Approved By BC	2024	Resource: v2	<a href="#">View</a>
Liberty Union - Thurston L.S.D	Approved By BC	2025	Resource: Initial	<a href="#">View</a>

## My Calendar

My Calendar displays important submission and meeting dates. The Auditor's Office is responsible for populating calendar events that are important notices for the taxing authorities. The calendar cannot be added/edited by anyone outside of the Auditor's Office.

In this example, certificate submissions are due by 12pm on March 26<sup>th</sup> in order to be included during the Budget Commission meeting on March 31<sup>st</sup>:

March 2025							month	week	day	list
Sun	Mon	Tue	Wed	Thu	Fri	Sat				
23	24	25	26	27	28	1				
2	3	4	5	6	7	8				
9	10	11	12	13	14	15				
16	17	18	19	20	21	22				
23	24	25	26	27	28	29				
30	31	1	2	3	4	5				

To see more detail of a calendar item, select the item by clicking on it. Here, we've clicked on the entry for March 26<sup>th</sup>:

### Submissions due by 12pm

Title\*

Submissions due by 12pm

Description

Budget submissions due by noon for the Budget Commission meeting

Tax Authority Type\*

All

Date\*

3/26/2025

MM/DD/YYYY


Start Time\*

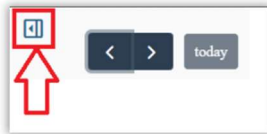
12:00 PM


End Time\*

12:30 PM

Cancel

Instructions and a list of All Events for the calendar can be accessed by clicking the :





Instructions

- Select dates and you will be prompted to create a new event
- Drag and drop events
- Click an event to update or delete it

☒ Toggle Whole Calendar

☒ Toggle Weekends


All Events (46)

Jan 27, 2025 8:30 AM - Jan 27, 2025 9:30 AM

January Budget Commission Meeting

## My Resources

My Resources contains helpful links and downloadable resources. To expand a section,

click the  dropdown arrow of whichever section you'd like to expand:



**Note:** The Auditor's Office will update/post new items to this section. If there's something you'd like to see here, reach out and we'll be happy to add it!

## Action Items

Navigate to action items to find certificates that are currently in draft status (haven't yet been submitted to the Auditor's Office) or items that need corrections.

In this example, the certificate hasn't yet been submitted (hence "Draft" status). To complete the certificate and submit it, click "View":

Action Items					
Tax Authority Name	Status	Year	Resource	Appropriation	Actions
Liberty Union - Thurston L.S.D	Draft	2024	Version: 2	Version: 0	<a href="#">View</a>



This opens the certificate submission screen so that you can continue entering funds, adding documentation, preview, and eventually “Submit to Reviewer”

Certificate Submission - Liberty Union - Thurston L.S.D

Year: 2024 - Resource Version: 2 - Appropriation Version: Initial - Type: Resource & Appropriation

	Prior Year				Resources					Appropriations			
Fund	Ending Cash Balance	Advances	Carryover Encumbrances	Start of Year Unencumbered Balance	Taxes	Rollbacks	Other Taxes	Other Sources	Total Estimated Receipts	Total Available Resources	Appropriation Budget	Unappropriated Balance	Warning
+	101 General Fund												
(001-0000) General Fund *	\$ 20,427,002.95	\$ 0.00	\$ 10.00	\$20,426,992.95	\$ 5,520,000.00	\$ 678,000.00	\$ 0.00	\$ 12,878,347.44	\$19,076,347.44	\$39,503,340.39	\$ 0.00	\$39,503,340.39	
+	Special Revenue Fund												
018 Public School Support*	\$ 41,784.74	\$ 0.00	\$ 0.00	\$41,784.74	\$ 0.00	\$ 0.00	\$ 0.00	\$ 117,234.00	\$117,234.00	\$159,018.74	\$ 0.00	\$159,018.74	
019 M.H. Jennings*	\$ 195.31	\$ 0.00	\$ 0.00	\$195.31	\$ 0.00	\$ 0.00	\$ 0.00	\$ 73,720.00	\$73,720.00	\$73,915.31	\$ 0.00	\$73,915.31	

[Add Fund](#)
[Add Supporting Documentation](#)
[Submit To Reviewer](#)
[Preview Resource](#)
[Preview Appropriation](#)

## User Management

### Adding a New User

User management is an option available to tax authority admins only. This is where a tax authority administrator can add/edit new users.

To add a user, navigate to the User Management section and click “Add User”:

Home	Users <a href="#">Add User</a>							
My Dashboard	Tax Authority	Role	Username	Name	Position	Primary Contact Method	Phone Number	Email
My Calendar	No data available							
My Resources								
Recent Submissions								
Certificate Submission								
Action Items								
User Management								

Once the “Add User” screen appears, there are several fields:

- 1) **Tax Authorities:** Click on the “Tax Authorities” field and select the tax authority for the new user. If you are the tax authority admin for only one tax authority, you’ll only have that same tax authority as an option



ABolyard | Liberty Union - Thurston L.S.D

## Add User

Tax Authorities

☐ Liberty Union - Thurston L.S.D - Liberty Union - Thuston L.S.D.

- 2) Once you select the tax authority, you may need to click in the white space next to Add User to collapse the tax authority box
- 3) **Roles:** Select at least one role for the new user

Roles\*

☐ None

☐ Tax Authority Read Only

☐ General Read Only

☐ Tax Authority User

☐ Tax Authority Admin

**NOTE:** For a more detailed understanding of roles, please see the “Understanding Role Types” section.

- 4) **UserName & Name:** For simplicity, we recommend the first letter of the first name then the last name of the user. For example, the username for Bob Barker would be BBarker

Username\*

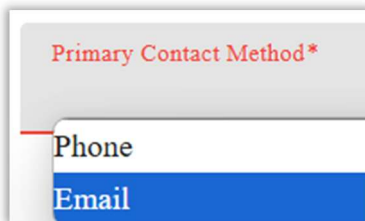
BBarker

Name\*

Bob Barker

- 5) **Position:** Enter the title or position of the user
- 6) **Password & Confirm Password:** Create a simple password when adding a user. Once the user has been added, we recommend them logging in and changing their password.
- 7) **Email Address:** Enter the email address where the user would like to receive certificate notifications and correspondence with the Auditor’s Office.

- 8) **Primary Phone Number:** Enter the phone number where the user would like to receive correspondence with the Auditor's Office.
- 9) **Secondar Phone Number:** This is not a required field, but feel free to add a second phone number here.
- 10) **Primary contact Method:** We recommend selecting Email here as this is where DocLink notifications will be sent. (For more information on notifications, please refer to the notifications section).



Once the user information has been completed, click the “Save” Button.

To see the new user on the Users screen, you may need to refresh the screen and navigate back to the User Management section.

Users								Add User
Tax Authority	Role	Username	Name	Position	Primary Contact Method	Phone Number	Email	
Liberty Union - Thurston L.S.D	TAUser	BBarker	Bob Barker	Test Account	Email	5555555555	test@test.com	

## Editing an Existing User

The tax authority admin role also has the ability to edit existing users. To edit an existing user, navigate to the User Management screen and click anywhere in the row of the contact you want to edit:

Users								Add User
Tax Authority	Role	Username	Name	Position	Primary Contact Method	Phone Number	Email	
Liberty Union - Thurston L.S.D	TAUser	BBarker	Bob Barker	Test Account	Email	5555555555	test@test.com	
Liberty Union - Thurston L.S.D	TAAAdmin	LibertyAdmin	LibertyAdmin	TA Admin	Email	1234567896	amanda.rollins@fairfieldcountyohio.gov	

This will open the Edit User screen

**Edit User** [X]

Tax Authorities  
Liberty Union - Thurston L.S.D - Liberty Union - Thuston L.S.D.

Roles\*  
Tax Authority User

Username\*  
BBarker

Name\*  
Bob Barker

Make the necessary changes and click “Save”.

## Changing a Password

Users are advised to change their password when they first log in. After that, users can change their password however frequent (or infrequent) they’d like to change it.

To change the password, click “Change Password” in the upper right corner



Enter the current password and a new password, then click Submit”

**DOC Link**

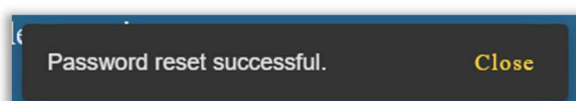
### Change Password

Enter current password\*  
.....

Enter new password\*  
.....

Submit

A small message will appear at the bottom of the screen stating the password change was successful:



**NOTE:** If you're entering an incorrect password, or duplicating the same password, messages will appear at the bottom of the screen as well.

## Understanding Role Types

Here is a comprehensive list of all role types available in DocLink and duties of each role type:


- Taxing Authority User
  - Create Certificates
  - View Submissions and status of submission
  - Add fund/funds to the certificate
  - Upload supporting documentation for certificate
  - View/PDF Print unapproved certificates and detail
  - Submit certificates to Administrator (Auditor's Office)
  - View Resources
  - View Calendar
  
- Taxing Authority Administrator
  - Create Certificates
  - View Submissions and status of submission
  - Add fund/funds to the certificate
  - Upload supporting documentation for certificate
  - View/PDF Print unapproved certificates and detail
  - Modify/Edit Certificates
  - Submit Certificates to Administrator (Auditor's Office)
  - View Resources
  - View Calendar
  - Create Taxing Authority Users and manage user passwords \*
  
- Taxing Authority Guest (Read Only)
  
- Administrator (reserved for Auditor's Office)
  - Create Certificates
  - View Submissions
  - Add fund/funds to the certificate
  - Modify/Edit Certificates
    - Enter/Add Estimated Taxes and Rollbacks

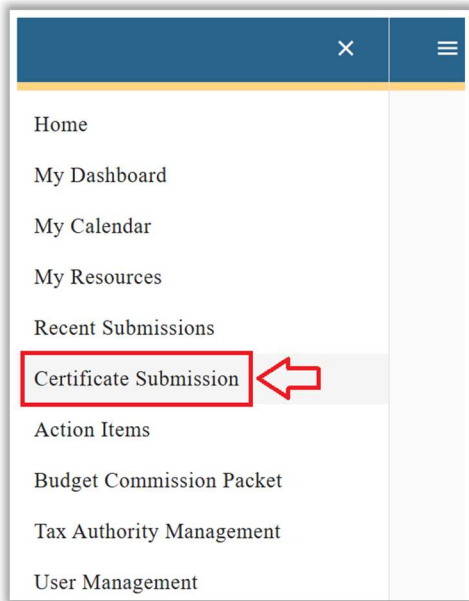
- Reject/Return Certificates to Taxing Authority Administrator
- Create Budget Commission Packets
- View Resources
- View/Edit Calendar
- Create Taxing Authority Users and manage user passwords
- System Administrator (reserved for Auditor's Office)
  - Create Taxing Authority
  - Create Taxing Authority Users and manage user passwords
  - Maintain Calendar
  - Maintain Resources
  - Maintain Special Announcements
  - Modify/Edit Certificates
    - Enter/Add Estimated Taxes and Rollbacks
  - Reject/Return Certificates to Taxing Authority Administrator
  - Create Budget Commission Packets
- Budget Commission (reserved for Budget Commission members)
  - View Packet
  - Approve Packet
  - Reject Certificates from Packet

*\*Taxing Authority Administrators may reach out to [localgovsupport@fairfieldcountyohio.gov](mailto:localgovsupport@fairfieldcountyohio.gov) for assistance in determining a User Role.*

## Creating a Certificate

Certificate Submission allows you to create a Certificate of Estimated Resources and/or a Certificate of Appropriations.

- 1) From the  menu in the upper left corner, select “Certificate Submission”:



- 2) This will open the “New Certificate” window. Select your tax authority from the Tax Authority dropdown list and select the year for the certificate of which you’re working with.

A screenshot of the 'New Certificate' form. The form has a title 'New Certificate' at the top. Below the title are two dropdown menus: 'Tax Authority\*' with the selected value 'Walnut Township L.S.D. -...' and 'Year\*' with the selected value '2025'. Below these is a section titled 'Type of Submission?' with two toggle switches: 'Resource' (which is checked) and 'Appropriation' (which is unchecked). At the bottom of the form are two buttons: 'Create' and 'Cancel'.

- a.
- b. NOTICE: The “Resource” toggle is auto-selected only when you’re entering the first Official Certificate of Estimated Resources. It will not be auto-selected if you are entering an Amended Certificate or Appropriations Certificate):

A close-up screenshot of the 'Type of Submission?' section of the form. It shows two toggle switches: 'Resource' and 'Appropriation'. The 'Resource' toggle is checked, and its label is highlighted with a red rectangular box. The 'Appropriation' toggle is unchecked.

- 3) Select the type of certificate you are creating:
  - a. If you are creating a resource certificate, click the Resource toggle:

Type of Submission?

Resource ☒ Appropriation ☐

- b. If you are creating an appropriation certificate, click the Appropriation toggle:

Type of Submission?

Resource ☐ Appropriation ☒

- c. If you are creating both a resource certificate and an appropriation certificate, click both:

Type of Submission?

Resource ☒ Appropriation ☒

## Entering Certificate Data

- 1) Once you've created a certificate, the Certificate Submission screen will appear:

DOCLink
AudAdmin | Administrator
Change Password Logout

Certificate Submission - Walnut Township L.S.D.

Year: 2024 - Resource Version: Initial - Appropriation Version: Initial - Type: Resource & Appropriation

	Prior Year				Resources						Appropriations		
Fund	Ending Cash Balance	Advances	Carryover Encumbrances	Start of Year Unencumbered Balance	Taxes	Rollbacks	Other Taxes	Other Sources	Total Estimated Receipts	Total Available Resources	Appropriation Budget	Unappropriated Balance	Warning
+	101 General Fund												
Select Fund▼				\$0.00					\$0.00	\$0.00		\$0.00	
+	Special Revenue Fund												

Add Fund
Add Supporting Documentation
Submit To Reviewer
Preview Resource
Preview Appropriation

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Please visit Fairfield County Auditor's Office for additional resources or assistance with the DocLink solution.


- 2) To add funds, click the in the corresponding fund section, then click "Select Fund":



	Prior Year
Fund	Ending Cash Balance
<b>+</b>	101 General Fund
Select Fund▼	
<b>(001-0000) General Fund *</b>	
(001-9196) General Bus	
(001-9992) Capital & Maintenance Set-Aside	Special Revenue Fund
(001-9991) Textbook & Instructional Materials	Debt of Service Fund
(001-9993) Statutory Budget Reserve	
(001-9994) Parity Aid	
	Documentation

3) Type in the amounts for each column:

	Prior Year >				Resources >						Appropriations >		
Fund	Ending Cash Balance	Advances	Carryover Encumbrances	Start of Year Unencumbered Balance	Taxes	Rollbacks	Other Taxes	Other Sources	Total Estimated Receipts	Total Available Resources	Appropriation Budget	Unappropriated Balance	Warning
<b>+</b>	101 General Fund												
(001-9196) General Bus▼	\$ 6,957,246.00	\$ 0.00	\$ 0.00	\$ 6,957,246.00	\$ 450.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 450.00	\$ 6,957,696.00	\$ 2,500.00	\$ 6,955,196.00	

\*Click the  arrows at the top of the columns to expand/collapse sections:

Collapsed Prior Year:

	Prior Year <	Resources >						Appropriations >		
Fund	Start of Year Unencumbered Balance	Taxes	Rollbacks	Other Taxes	Other Sources	Total Estimated Receipts	Total Available Resources	Appropriation Budget	Unappropriated Balance	Warning
<b>+</b>	101 General Fund									
(001-9196) General Bus▼	\$ 6,957,246.00	\$ 450.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 450.00	\$ 6,957,696.00	\$ 2,500.00	\$ 6,955,196.00	

Collapsed Resources:

	Prior Year <	Resources <	Appropriations >		
Fund	Start of Year Unencumbered Balance	Total Available Resources	Appropriation Budget	Unappropriated Balance	Warning
<b>+</b>	101 General Fund				
(001-9196) General Bus▼	\$ 6,957,246.00	\$ 6,957,696.00	\$ 2,500.00	\$ 6,955,196.00	

Collapsed Appropriations:

	Prior Year	Resources	Appropriations	
Fund	Start of Year Unencumbered Balance	Total Available Resources	Unappropriated Balance	Warning
+	101 General Fund			
(001-9196) General Bus▼	\$6,957,246.00	\$6,957,696.00	\$6,955,196.00	

**NOTE:** Depending on the certificate submission type you selected, only certain fields will be available for input: If you selected Resource certificate only, then you will not be able to input data for the Appropriation fields and vice versa. All fields will be available for input only if you've opted to create both the resource and appropriation certificate during certificate submission creation. However, you will still be able to show/hide specific portions of the certificate.

## Adding a new fund

- 4) If a fund does not appear in the “Select Fund” dropdown, a new fund can be created by clicking “Add Fund” at the bottom of the page:

Add Fund

Add Supporting Documentation

Submit To Reviewer

- 5) Enter the Fund Name, Fund Type, and Tax and click “Add Fund”:

### Add New Fund

Fund Name\*  
FundName Test


Fund Type\*  
Special Revenue Fund


Tax Authority\*  
Walnut Township L.S.D.

Cancel

Add Fund

- 6) The fund you just created should now be selectable in the “Select fund” dropdown of the certificate.
- 7) If you have accidentally selected multiples of the same fund, named a fund incorrectly, or simply want to remove a fund, you can remove the fund from the

certificate by clicking the  (trashcan) on the fund row (in the “Warning” column). \*The fund MUST have all \$0 amounts entered for the trashcan to be visible. If you have any amount entered in the row in any field, you must first zero it out.

	Prior Year				Resources						Appropriations		
Fund	Ending Cash Balance	Advances	Carryover Encumbrances	Start of Year Unencumbered Balance	Taxes	Rollbacks	Other Taxes	Other Sources	Total Estimated Receipts	Total Available Resources	Appropriation Budget	Unappropriated Balance	Warning
+	101 General Fund												
(001-9196) General Bus	\$ 6,957,246.00	\$ 0.00	\$ 0.00	\$6,957,246.00	\$ 450.00	\$ 0.00	\$ 0.00	\$ 0.00	\$450.00	\$6,957,696.00	\$ 2,500.00	\$6,955,196.00	
(001-9992) Capital & Maintenance ...	\$ 0.00	\$ 0.00	\$ 0.00	\$0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$0.00	\$0.00	\$ 0.00	\$0.00	

8) The Warning column also lets you know of exceeding funds:

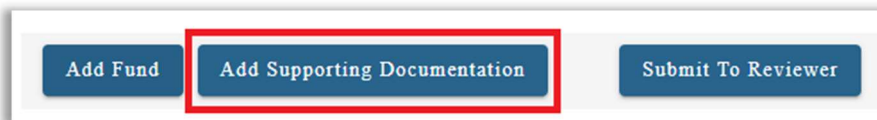
Prior Year				Resources						Appropriations			Warning
Fund	Ending Cash Balance	Advances	Carryover Encumbrances	Start of Year Unencumbered Balance	Taxes	Rollbacks	Other Taxes	Other Sources	Total Estimated Receipts	Total Available Resources	Appropriation Budget	Unappropriated Balance	
(001-0000) General Fund #	\$ 6,957,246.00	\$ 0.00	\$ 0.00	\$6,957,246.00	\$ 7,241,700.00	\$ 734,500.00	\$ 0.00	\$ 2,050,197.00	\$10,026,397.00	\$16,983,643.00	\$ 0.00	\$16,983,643.00	
(001-9196) General Bus	\$ 0.00	\$ 0.00	\$ 0.00	\$0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$0.00	\$0.00	\$ 100.00	-\$100.00	EXCEEDING FUNDS


9) This warning message can help you make corrections prior to submitting a certificate to the Auditor’s Office.

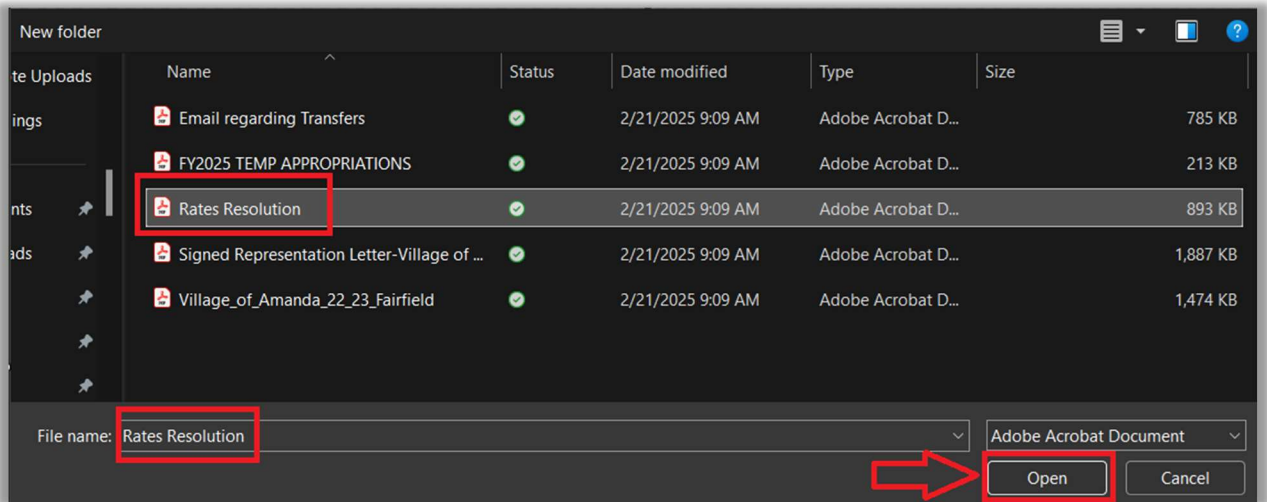
## Add supporting documentation

It’s important to remember to upload supporting documentation such as board meeting minutes, resolutions, year end balances, etc. to go along with the certificate(s) you’re submitting.

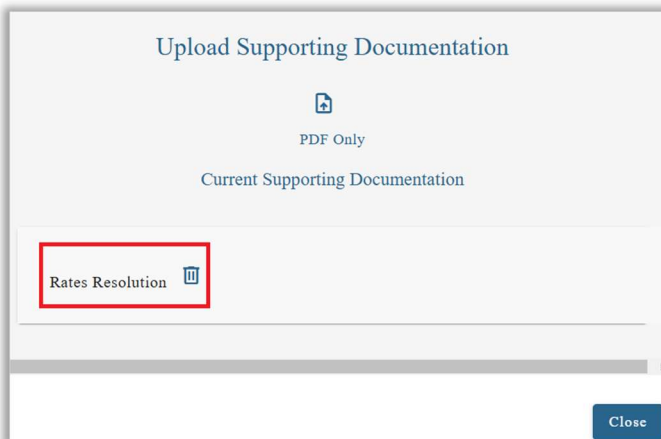
1) To add supporting documentation with your certificate, click the “Add Supporting Documentation” button at the bottom of the screen:



- 2) Once the “Upload Supporting Documentation” screen appears, click on the  upload image.
- 3) Navigate to the file folder that contains the supporting documentation that you wish to upload and select a document. Things to remember:
  - a. You may **only upload PDF files**
  - b. You can only upload one document at a time
- 4) Once you select the file you wish to upload, click “Open”:



- 5) After a few moments, the file you selected will appear on the “Upload Supporting Documentation” screen



- 6) Repeat steps 2-4 until you’ve uploaded all supporting documents that you wish to upload.
- If you want to remove any of the uploaded documents, click the trashcan next to the document.
  - Click “Close” once you’ve completed loading the supporting documentation.



## Preview and Submit Certificates

During any point of certificate creation, you can preview the certificate.

## Preview Certificates

On the “Certificate Submission” screen, depending on which certificate type you are working with, there are preview buttons available (in this example, we are creating both a resource and appropriation certificate, so both buttons are available):

**Certificate Submission - Walnut Township L.S.D.**  
Year: 2024 - Resource Version: Initial - Appropriation Version: Initial - Type: Resource & Appropriation

Fund	Prior Year				Resources					Appropriations			Warning
	Ending Cash Balance	Advances	Carryover Encumbrances	Start of Year Unencumbered Balance	Taxes	Rollbacks	Other Taxes	Other Sources	Total Estimated Receipts	Total Available Resources	Appropriation Budget	Unappropriated Balance	
+	101 General Fund												
(001-9196) General Bus	\$ 6,957,246.00	\$ 0.00	\$ 0.00	\$6,957,246.00	\$ 450.00	\$ 0.00	\$ 0.00	\$ 0.00	\$450.00	\$6,957,696.00	\$ 2,500.00	\$6,955,196.00	
(001-9992) Capital & Maintenance ...	\$ 0.00	\$ 0.00	\$ 0.00	\$0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$0.00	\$0.00	\$ 0.00	\$0.00	
+	Special Revenue Fund												
+	Debt of Service Fund												

[Add Fund](#)
[Add Supporting Documentation](#)
[Submit To Reviewer](#)
[Preview Resource](#)
[Preview Appropriation](#)

- 1) Both previews will display the unofficial copy of the certificates:
  - a. For the certificate of estimated resources:

Fiscal Year: 2024

**OFFICIAL CERTIFICATE OF ESTIMATED RESOURCES**

REVISED CODE SECTION 5705.36

County Auditor's Office, Fairfield County, Ohio Date: 03/04/25

Fiscal Year: 2024  
Taxing Authority: Walnut Township L.S.D.  
Submitted By: Auditor Admin

The following is the "Official Certificate of Estimated Resources" for the fiscal year beginning January 01, 2024, as revised by the Budget Commission of Fairfield County, which shall govern the total of appropriations made at any time during the fiscal year:

Funds	Unencumbered Balance Jan 1	Taxes	Rollbacks & Other Sources	Total
General Fund	\$6,957,246.00	\$450.00	\$0.00	\$6,957,696.00
<b>Total All Funds</b>	\$6,957,246.00	\$450.00	\$0.00	\$6,957,696.00

**Jill Bradford** Treasurer  
Walnut Township L.S.D.  
11850 Lancaster Street  
Millersport, Ohio, 43046

Budget Commission:

- b. For the certificate of appropriations:

Fiscal Year: 2024

**CERTIFICATE OF COUNTY AUDITOR THAT THE TOTAL APPROPRIATIONS  
FROM EACH FUND DO NOT EXCEED THE AMENDED OFFICIAL CERTIFICATE  
OF ESTIMATED RESOURCES**

REVISED CODE SECTION 5705.39

County Auditor's Office, Fairfield County, Ohio      Date: 03/04/25

Fiscal Year: 2024  
Taxing Authority: Walnut Township L.S.D.  
Submitted By: Auditor Admin

The County Auditor's Office do hereby certify that the total appropriations from each fund taken together with all other outstanding appropriations does not exceed the last amended official certificate of estimated resources for the fiscal year, as determined by the Budget Commission of said County.

Funds	Total Sources	Total Appropriations	Balance	Appropriations Within Total Sources
General Fund	\$6,957,696.00	\$2,500.00	\$6,955,196.00	
TOTALS	\$6,957,696.00	\$2,500.00	\$6,955,196.00	

Jill Bradford Treasurer,  
Walnut Township L.S.D.  
11850 Lancaster Street

**Note:** These certificates will display as “unofficial” until you’ve submitted the certificates and they’ve been approved by the Auditor’s Office.

## Submit to Reviewer

- 1) Once you’ve completed the certificate and uploaded all supporting documentation, you’re ready to submit the certificate.
- 2) Click the “Submit to Review” button at the bottom of the Certificate Submission screen:

Certificate Submission - Walnut Township L.S.D.

Year: 2024 - Resource Version: Initial - Appropriation Version: Initial - Type: Resource & Appropriation

Fund	Prior Year				Resources						Appropriations		Warning
	Ending Cash Balance	Advances	Carryover Encumbrances	Start of Year Unencumbered Balance	Taxes	Rollbacks	Other Taxes	Other Sources	Total Estimated Receipts	Total Available Resources	Appropriation Budget	Unappropriated Balance	
+	101 General Fund												
(001-9196) General Bus	\$ 6,957,246.00	\$ 0.00	\$ 0.00	\$6,957,246.00	\$ 450.00	\$ 0.00	\$ 0.00	\$ 0.00	\$450.00	\$6,957,696.00	\$ 2,500.00	\$6,955,196.00	
(001-9992) Capital & M...	\$ 0.00	\$ 0.00	\$ 0.00	\$0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$0.00	\$0.00	\$ 0.00	\$0.00	

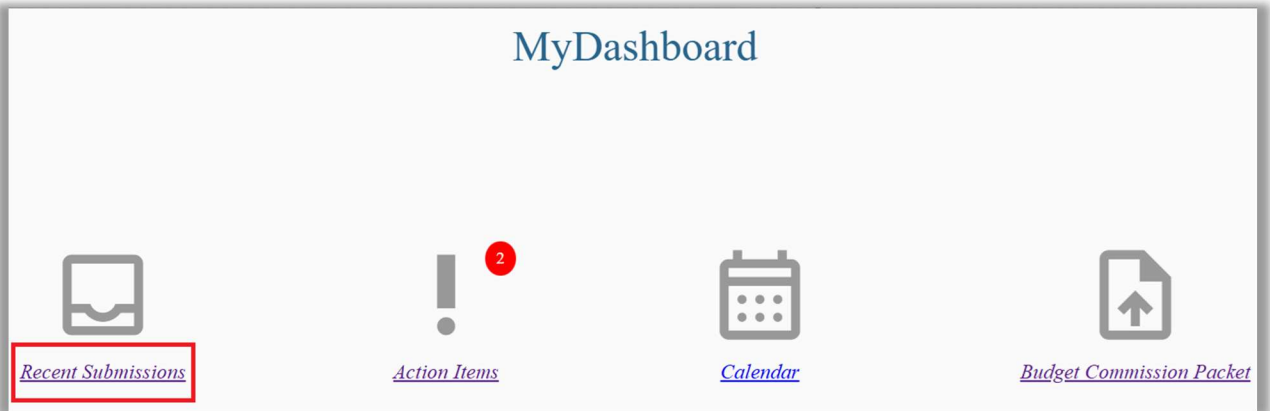
Add FundAdd Supporting Documentation

Submit To Reviewer

←

Preview ResourcePreview Appropriation

- 3) Upon submission, you'll be routed back to MyDashboard. You may click on "Recent Submissions" to see the status of your certificate



- 4) On the Recent Submissions screen, notice the status of your certificate:

The screenshot shows the 'Recent Submissions' header. Below it is a filter 'Filter by Tax Authority'. A table follows with columns: Tax Authority Name, Status, Year, Version, and Actions. One row is visible for 'Walnut Township L.S.D.' with a status of 'Submitted To Reviewer' (highlighted with a red box), year '2024', and version 'Initial'. The Actions column has a 'View' link and a download icon.

Tax Authority Name	Status	Year	Version	Actions
Walnut Township L.S.D.	Submitted To Reviewer	2024	Initial	<a href="#">View</a> 

- 5) Since you've just submitted your certificate, the status is "Submitted to Review". At this point, the Auditor's Office has been notified of your certificate submission and will review everything.

## Certificate Approval Process

### Certificate of Estimated Resources

If you've submitted a certificate of estimated resources, the auditor's office will first review the certificate submission. Once it has been accepted (no exceeding funds, all supporting documentation received, etc.) it will then be put on the budget commission packet for the budget commission meeting.

Once accepted by the Auditor's office, the status of the certificate will update to "Approved" on the Recent Submissions Screen.

Once accepted and approved by the Budget Commission at the budget commission meeting, the status will be updated to "Approved by BC". Here you can click "View" to view, download, or print the signed certificate.



## Certificate of Appropriations

If you've submitted a certificate of appropriations, the auditor's office will review the certificate submission. Once it has been accepted (no exceeding funds, all supporting documentation received, etc.) it will be signed, and you'll receive a notification via email that it has been approved.

At this point, you can navigate to your "Recent Submissions" and view the certificate.

## Certificate Process: Returned for Corrections

Once you've submitted a certificate, the auditor's office will review it. If there are any issues: exceeding funds, missing supporting documentation, etc., the certificate will be returned for correction.

If this happens, the submitter will receive an email stating corrections are needed. At this point, you can log into DocLink, view your recent submissions, and edit the one marked "Returned to Submitter"

Recent Submissions				
Filter by Tax Authority				
Tax Authority Name	Status	Year	Version	Actions
Walnut Township L.S.D.	Approved	2024	Initial	<a href="#">View</a> <a href="#">↑</a>
Walnut Township L.S.D.	Returned To Submitter	2025	Initial	<a href="#">View</a> <a href="#">↑</a>
Walnut Township L.S.D.	Draft	2025	Resource: v2	<a href="#">View</a>

- 1) To make the necessary corrections, click "View"

Walnut Township L.S.D.	Returned To Submitter	2025	Initial	<a href="#">View</a> <a href="#">↑</a>
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- 2) Find the fund(s) with errors, and make the necessary corrections. In this case, there's a fund with exceeding funds:

	Prior Year				Resources						Appropriations		
Fund	Ending Cash Balance	Advances	Carryover Encumbrances	Start of Year Unencumbered Balance	Taxes	Rollbacks	Other Taxes	Other Sources	Total Estimated Receipts	Total Available Resources	Appropriation Budget	Unappropriated Balance	Warning
(001-0000) General Fund *▼	\$ 6,957,246.00	\$ 0.00	\$ 0.00	\$6,957,246.00	\$ 7,241,700.00	\$ 734,500.00	\$ 0.00	\$ 2,050,197.00	\$10,026,397.00	\$16,983,643.00	\$ 0.00	\$16,983,643.00	
(001-9196) General Bus▼	\$ 0.00	\$ 0.00	\$ 0.00	\$0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$0.00	\$0.00	\$ 100.00	-\$100.00	EXCEEDING FUNDS

- 3) From this screen, you can also add more supporting documentation if needed by clicking the “Add Supporting Documentation” button.

## Budget Commission Approval

Once a Certificate of Estimated Resources has been submitted and accepted by the Auditor’s Office, it is moved to the Budget Commission for review and ready to be added to the packet for the Budget Commission meeting.

During this time, the Auditor’s Office will gather all resource certificates and put together the budget commission packet. Then, at the end of each month, the Budget Commission members meet to review all items in the packet.

Users will receive a notification via email once the budget commission packet is approved. At this time, you can go to Recent Submissions and view the “Approved By BC” certificate by clicking “View”:

Recent Submissions				
Filter by Tax Authority				
Tax Authority Name	Status	Year	Version	Actions
Walnut Township L.S.D.	Approved By BC	2025	Resource: Initial	<a href="#">View</a>

This is where you can access your approved certificate that’s been signed by the budget commission.

## Notifications

Admins are notified via email:

- When a certificate is submitted/resubmitted
- When the status on a certificate changes from Draft to Submitted To Reviewer

The submitting tax authority is notified via email when:

- An admin returns their submission for correction
- An admin approves their submission (language now says 'accepted')
- When their approved submission is returned for correction
- When their submission is put on a packet
- When their submission is removed from a packet
- A packet is approved which contains their submission

As DocLink expands, notifications will be updated.

## Additional Resources & Training

For additional resources and training videos, please visit our website at

<https://www.co.fairfield.oh.us/auditor/fc-DocLink.html>

The screenshot shows the Fairfield County Auditor's Office website. At the top is a navigation bar with links: COUNTY HOME, PROPERTY SEARCH, AUDITOR'S OFFICE + INFORMATION, COUNTY RESOURCES, and FOLLOW US. Below the navigation bar, the page is titled "What is DocLink?" and describes it as a submission management system. It lists "How it Works" by connecting to the Auditor's Office through a secured web-based solution, replacing email submissions for Budget commission, Tax settlement distributions, and Local government distributions. A "DocLink" button is highlighted with a red box and a red arrow pointing to it with the text "Go to DocLink!". To the right, a red arrow points down from the text "Training Videos!" to a grid of six video thumbnails. The thumbnails are titled: "DocLink Overview", "FC DOCLINK Initial Certificate Submission", "DocLink Submission Approved", "DocLink Certificate Returned", "DocLink Certificate of Appropriations", and "DocLink Certificate Amendments". Each thumbnail features the "DOCLink" logo and a red play button icon.

## Contact Us

If you have any questions or comments, please don't hesitate to contact us:

Email: [localgovsupport@fairfieldcountyohio.gov](mailto:localgovsupport@fairfieldcountyohio.gov)

Phone: 740-652-7020