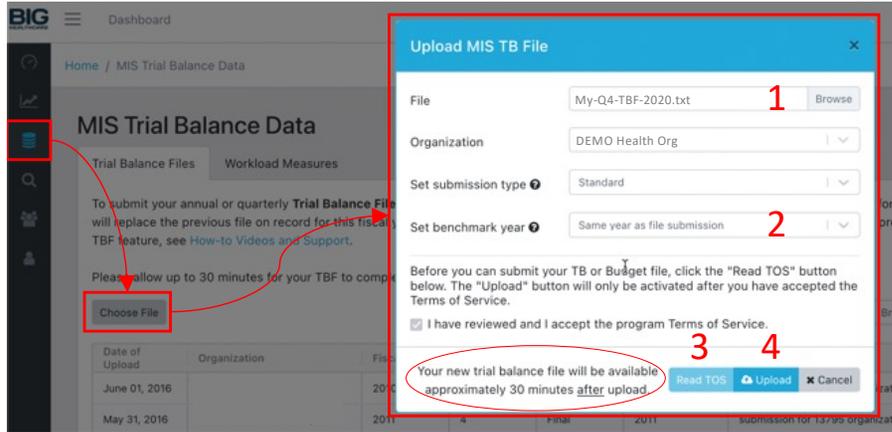


Submit a Standard Trial Balance File (TBF)

There are two types of standard TBF submissions:

1. **Final quarter (Q4).** This is the regular annual TBF submission performed each summer by ALL BIG Member organizations.
2. **Quarterly to be annualized (Q2 or Q3).** Subscribing Member organizations can also submit a quarterly file that can be annualized for **in-year comparisons** (eg. create an FY22 Q2 TBF for comparison vs FY21 results).

1) Final Quarter (Q4) TBF



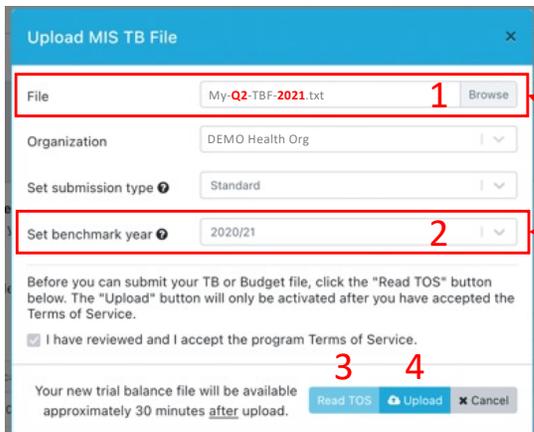
Final Quarter (Q4) TBF loading steps:

1. Locate your **Q4 TBF file** and load it.
2. Set benchmark year (optional). The default is to compare against the same fiscal year as the TBF file, but you may select a prior year.
3. Click 'Read TOS' button to accept TOS and activate 'Upload' button.
4. Click 'Upload' button.

New TBF Availability:

- **Annual fiscal year flip-over.** During the annual submission period, benchmarking against other organizations will NOT be available until all organizations in your region have also submitted their TBF's. You will receive a notification once results calculations and the fiscal year *flip-over* have been completed.
- **TBF Updates.** You may re-submit your Q4 TBF at any time (eg. to update your results) in which case the platform may require up to 30 minutes to re-calculate your results. During this process, the main dashboard and Reports and Tools pages will not be available for this TBF (all others will still be available).

2) Quarterly TBF to be Annualized (Q2 or Q3)



Quarterly TBF to be Annualized loading steps:

1. Locate your **in-year Q2 or Q3 TBF file** and load it.
2. **Set benchmark year to prior year** (or earlier). NOTE: Do NOT set the year to 'same year as submission' since this is an in-year comparison and there will NOT be any other peer results available.
3. Click 'Read TOS' button to accept TOS and activate 'Upload' button.
4. Click 'Upload' button.