

How-to

# Submit a FUTURE year BUDGET Trial Balance File (TBF) p.1/2

Subscribing BIG Member organizations may submit a **future-year Budget TBF** for planning purposes.

**EXAMPLE:** Your organization creates a **future-year TBF for FY22/23** (must be complete Q4 data). The Budget TBF can be benchmarked against any historic year (eg. FY21/22, FY20/21, FY19/20). The Dashboard and Reports/Tools Hub will function as normal, but the Budget TBF results will reflect the hospital's submitted Budget FY (ie. FY22/23) benchmarked against the historic year that was selected by the user (eg. FY19/20).



This column represents the hospital's FY22/23 performance compared to the selected historical benchmark year (eg. FY19/20).

These results represent the hospital's budgeted FY22/23 performance for the selected historic benchmark year (eg. FY19/20). The quartile results also represent the historic benchmark year.

# Submit a FUTURE year BUDGET Trial Balance File (TBF) p.2/2

## Future Budget TBF loading steps:

1. Locate your **Q4 Future year Budget** TBF file and load it. NOTE: You may load multiple versions of a future budget file.
2. Set submission type to 'Future Budget'.
3. Create file label (free form text field). This should be a descriptive label that includes the TBF fiscal year and the year in comparison (eg. FY2021 budget vs FY2019).
4. **Set benchmark year.** The default is the current system fiscal year and you may optionally choose from two additional years prior.
5. Click 'Read TOS' button to accept TOS and activate 'Upload' button.
6. Click 'Upload' button.

**TBF Availability.** 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 specific TBF (all others will still be available).

