

Submit a Standard Trial Balance File (TBF)

NOTE: These instructions are **NOT** for uploading your **next fiscal year** TBF. For that, see **“How-to Submit a TBF for Next Fiscal Year”**.

Standard TBF submissions are for benchmarking your organization’s performance versus the **current fiscal year** or **prior years**. There are two types of TBF’s accepted:

- i. **Final quarter (Q4)**. Use this feature to replace an existing Q4 TBF submission (ie. updated data) or load a new Q4 TBF to benchmark against a different year.
- ii. **Quarterly to be annualized (Q2 or Q3)**. Subscribing Member organizations can also submit a quarterly file that our system will “annualize” for **in-year comparisons** (eg. create an FY22 Q2 TBF for comparison vs FY21 results).

Follow the steps below and [click here](#) to load your TBF.

Trial Balance File loading steps:

- 1. Locate your **Q4 (or Q2/Q3 in-year)** TBF file and load it.
- 2. Set benchmark year (optional). The default comparison year is the current fiscal year and you can select any prior year.
- 3. Click ‘Read TOS’ button to accept TOS and activate ‘Upload’ button.
- 4. Click ‘Upload’ button.

Please wait for benchmarking to complete. You may re-submit your TBF at any time 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 new, individual TBF. All pages and reports will still be available for TBF’s previously loaded.

