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 <u>click here</u> 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 <u>current</u> 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.

	Dashboard				_
Но	ome / MIS Trial Balance	Data	Upload MIS TB File		×
		-	File	my_FY21_Q4_Q3_Q2_TBF.txt	Browse
	MIS Trial Bala	ance Data	Organization	My Health Care Organization	1 🕶
	Trial Balance Files	Workload Measures Submit FY22/2	Set submission type 🕑	Standard	
	All TBF's submitted for are two Submission T	or your organization are listed below. Only ype options:	Set benchmark year 🛛	2021/22 2	· · ·)
	1) Standard (default	t). Use this type to update an existing Q4	Before you can submit you "Upload" button will only b	ur TBF, click the "Read TOS" button below be activated after you have accepted the	. The Terms of
	2) Future Budget Fil NOTE: Your TBF will	e. Subscribing Members may submit an in be available in approximately 30 minut	Service. I have reviewed and I accept the program Terms of Service.		
	instructions, visit the Choose File	How-to Videos and Support page.	Your new TBF will b approximately 30 minut	be available Read TOS & Upload	× Cancel
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