THE BENEFIT BANK®

How to Use Reporting Tools

A supplemental support document for TBB Administrators

QUICK REFERENCE	
Login Information	TBB Help Desk
Website: www.thebenefitbank.com	Phone: 1-855-TBB-HELP
Login Name:	(1-855-822-4357)
Password (hint):	Email: tbbhelp@thebenefitbank.com

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Send feedback about this document and all other questions or concerns to us at reporting@solutionsforprogress.com

Pronouns he/she, him/her, and his/hers used in examples refer to all TBB counselors or clients indiscriminately.

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Using The Benefit Bank To Manage Your Organization

Through The Benefit Bank, you can easily measure the impact you are having on your community using TBB reporting tools. As an Administrator, you can generate reports to keep yourself, your colleagues and your funders informed of the results of your efforts using The Benefit Bank. These tools are easy to use, intuitive and offer many options to customize your reports.

How to Access The Benefit Bank

As an Administrator, you are able to login to The Benefit Bank.

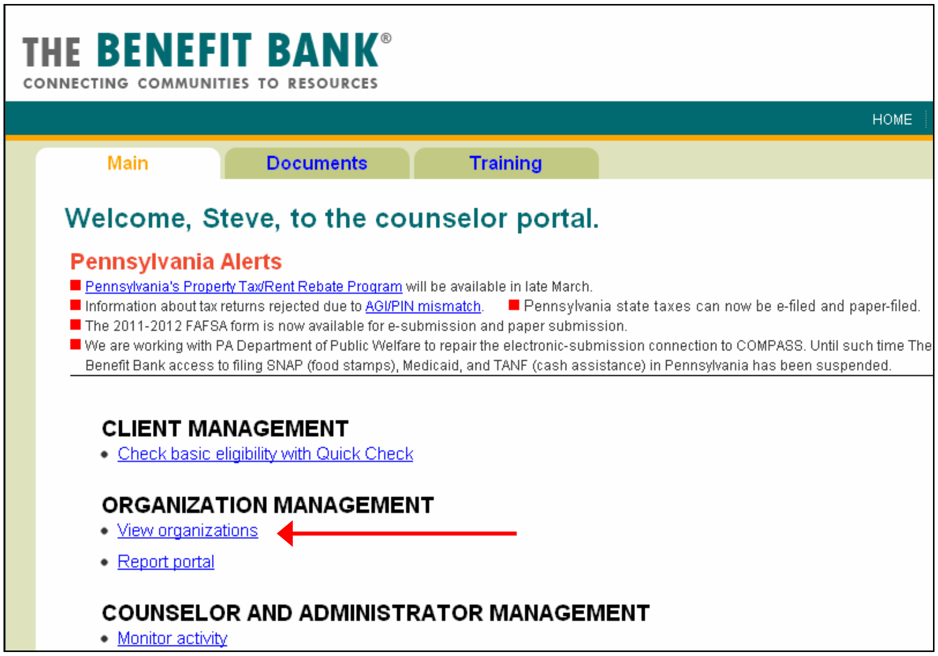
1. Go to www.thebenefitbank.com.
2. Click on the Counselor & Administrator Login button located on the right side of your screen.
3. Enter your login name and password to access the reporting tools from your portal page.

If you have forgotten your password, follow the on screen instructions to reset your password through the e-mail address associated with your TBB account.

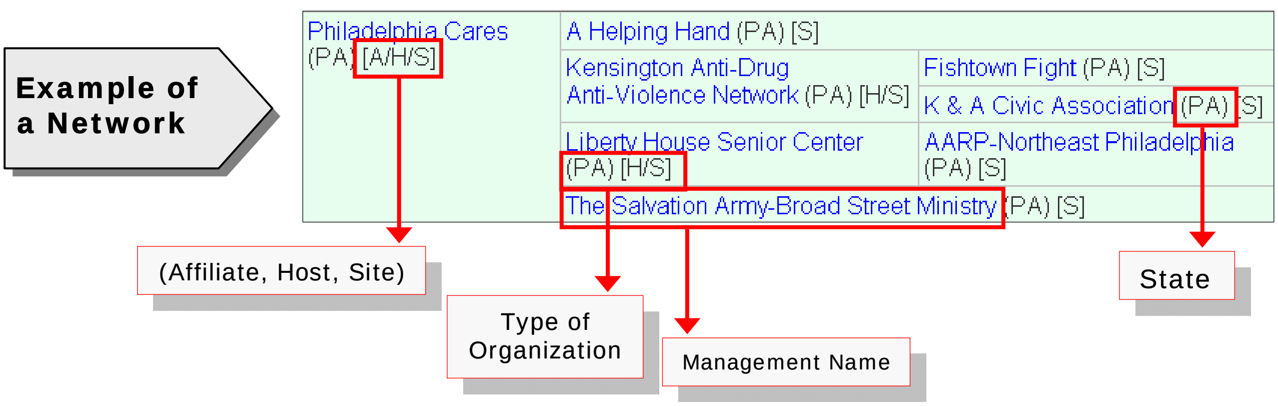
If you require help retrieving your login name or are having trouble resetting your password, contact The Benefit Bank Help Desk toll-free at:
1-855-TBB-HELP (1-855-822-4357).

Understanding your Network

Once logged in to the portal, you will find your tools for Organization Management. To see your network of sites, click on the **View Organizations.**



This will show you the network of sites you are able to request reports on.

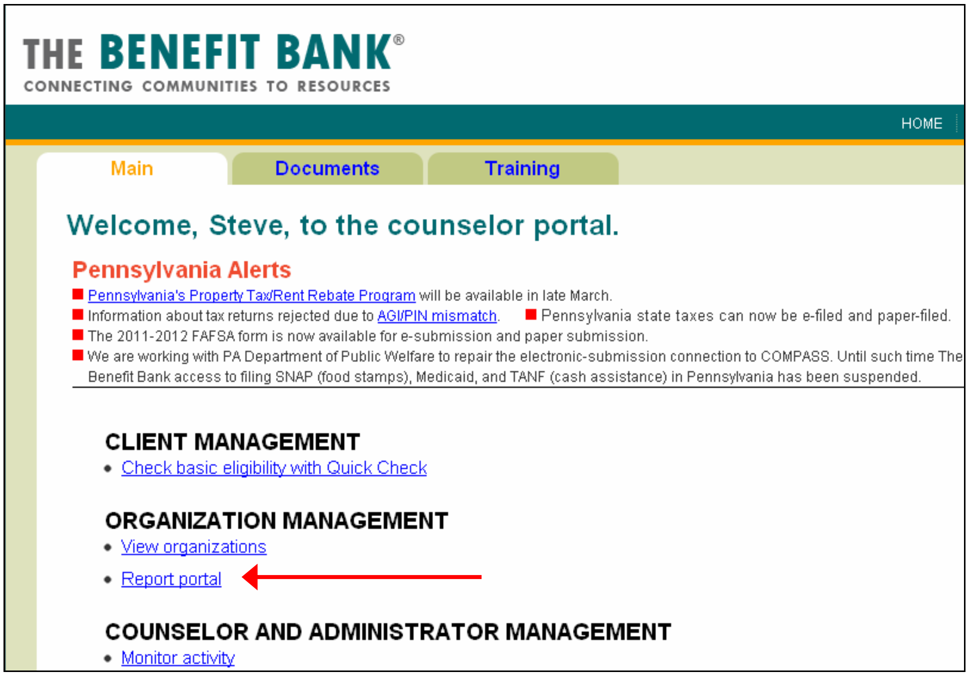


When a report is requested for Philadelphia Cares to “include affiliated sites” it will contain information on all member organizations.

If a report is requested on the Kensington Anti-Drug Anti-Violence Network and “include affiliated sites” is checked, the report will contain information about the Kensington site and also Fishtown Fight and the K & A Civic Association. If “include affiliated sites” is not checked in the report request, it would only include information about the Kensington site and not the two member organizations or affiliated sites.

The Benefit Bank Activity Reporting Tools

To access The Benefit Bank Activity Reporting Tools, click on the **Report Portal** link, located under Organization Management.



This takes you to the report portal.

There are four tabs available from the Report Portal:

- **Main** provides access to request reports, view graphs and charts and review status of your request.
- **My Reports** contains the list all of your saved reports.
- **Shared with Me** lists the reports others have shared with you.
- **Pending Share** contains a list of reports awaiting response to accept or decline. When no reports are pending the message “You have no pending shared reports at this time” appears.

Activity Reports Available on The Benefit Bank

There are two types of activity reports you can receive from The Benefit Bank.

Excel Format

These reports are delivered via e-mail to the address associated with your TBB account. The types of reports available in Excel Format are:

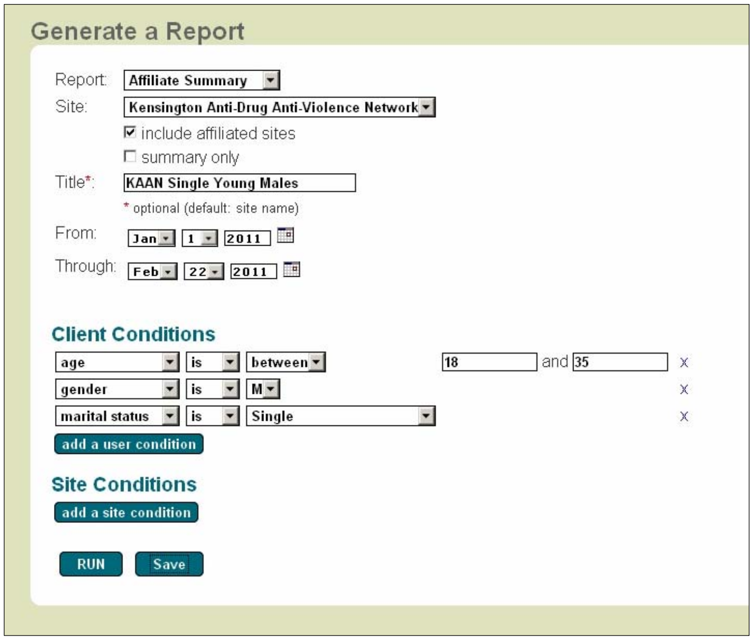
- **Affiliate Summary -** Standard activity report which includes active site and counselor totals, household size and age breakdowns, usage totals, federal and state tax summaries, and benefit eligibility estimations.
- **Application or Application by Counselor -** Number of applications processed per site or counselor, by application.
- **Organization -** Current and deleted organizations within the network including detailed information collected from the site profile.
- **Tax Summary -** Summary of Federal and State Taxes as well as Earned Income Tax Credit activity with prior-year comparisons.
- **User Report -** All users associated with the organization such as decision makers, site administrators, counselors, etc. regardless of active, disabled, or deleted within the network. Includes contact information and is filterable by user role. Along with the organization report, it's mostly used for administrative and communication purposes.
- **User by Organization -** Information about users such as decision makers, site administrators, counselors, etc. regardless of active, disabled, or deleted within the network, compiled by organization.

Graphs and Charts

These provide up to the minute information on the activity of the organization(s) you oversee within a chosen date range. These charts are visual graphs that enable you to review and export data on TBB activity. The types of Graphs and Charts available are:

- **Clients Served / Interval -** Clients served by interval: day, week, month, quarter or year
- **Total Applications Completed / Interval -** Total number of applications by interval: day, week, month, quarter or year
- **Applications / Returns Completed -** Number of applications submitted
- **Clients Served / DoW** - Total clients served by day of week
- **Clients Served / Hour -** Total clients served by hour of day
- **Total Sites / Interval** - Total number of sites by interval: day, week, month, quarter or year
- **Top Sites -** Productive sites in the network in ascending order by the number of clients who logged in, completed an application/tax return or submitted an application/tax return
- **Total Counselors / Interval -** Total number of counselors by interval: day, week, month, quarter or year
- **Total Applications Completed / Counselor -** Total number of applications completed by all counselors.

How to Generate, Schedule, and Run a Report



1. From the Main Tab in the Report Portal Click on "Generate/Save a Report".

2. Using the Report drop down menu, choose report type from Affiliate Summary, Application or Application by Counselor, Organization, Tax Summary, User Report or User by Organization.

3. Use the Site drop down menu to choose the organization.

4. Check "include affiliated sites" to include the activity of member organizations hosted by the requested organization.

5. If requesting an Affiliate Report, check "summary only" to see only the summary page of all activity, and not an individual report for every site included in the organization's network. This will greatly speed up the processing of your report request.

6. Title (optional). Naming becomes part of the email subject line and will help with organizing information. If you do not enter a title, the default title will be the name of the organization selected.

7. Choose date range. Use drop down selection fields to change month or day. To alter the year, utilize the calendar icon located on the right.

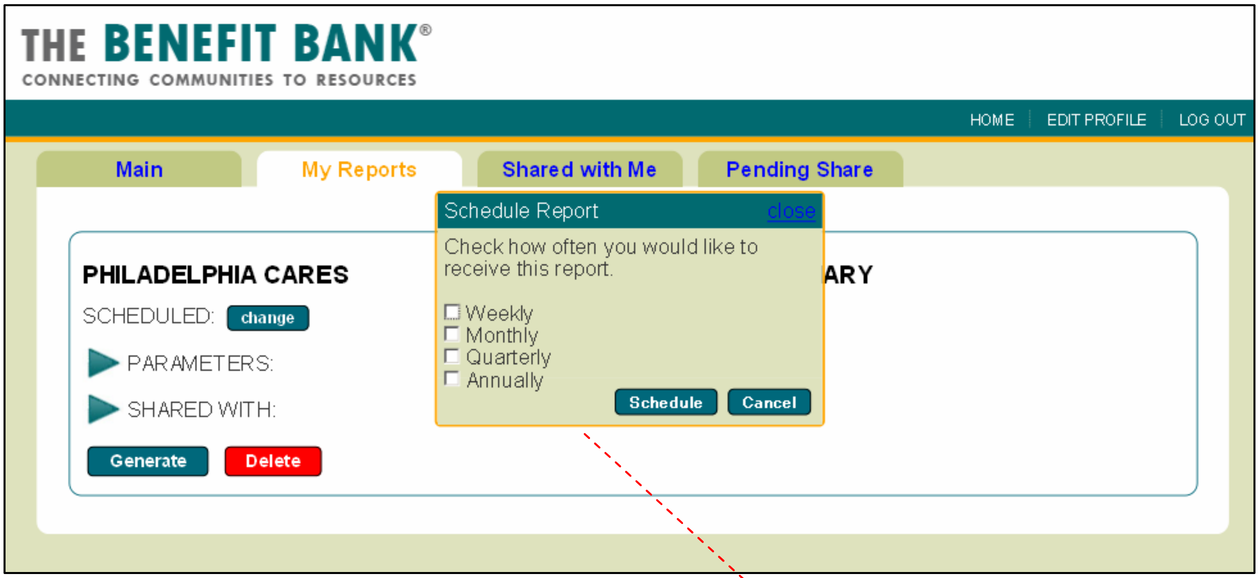
8. Client & Site Conditions. Use if you are interested in pinpointing more detailed information within your report.

Click Run if you only want the report to be emailed to your inbox.

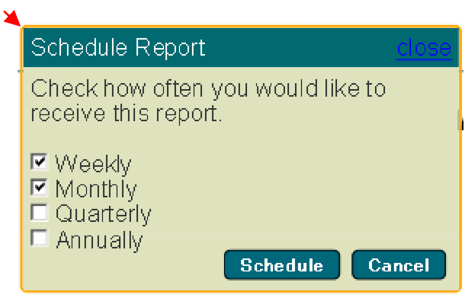
Click Save if you prefer to make this a reoccurring report or request as needed. Once saved, go to the "My Reports" tab to schedule as many frequencies as necessary from weekly, monthly, quarterly and annually.

Scheduling Automatic Reports

Auto-generated reporting utilizes the date range provided through scheduling.

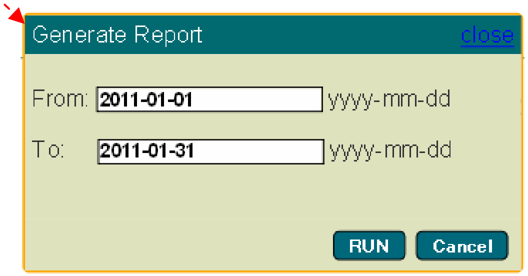


1. From “My Reports” click change to reveal the schedule report box.
2. After choosing (one or more) from the available frequencies, click “Schedule.”
3. Your report will go out with the next cycle that you requested by email.



Generating reports on an as needed basis

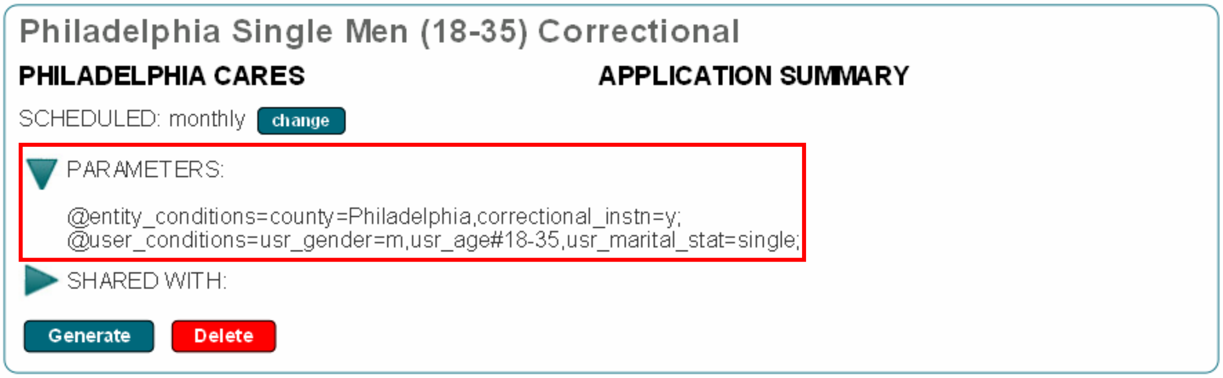
If you require your reports more or less frequently that auto-generated reporting provides, you may request them as needed.



1. From "My Reports" click generate to reveal the generate report box.
2. After entering the date range within the from and to boxes following the format Year-Month-Day (yyyy-mm-dd), click "Schedule."
3. The report will be sent to your email address.

About Parameters

Parameters enable the customization of the report(s) you receive.

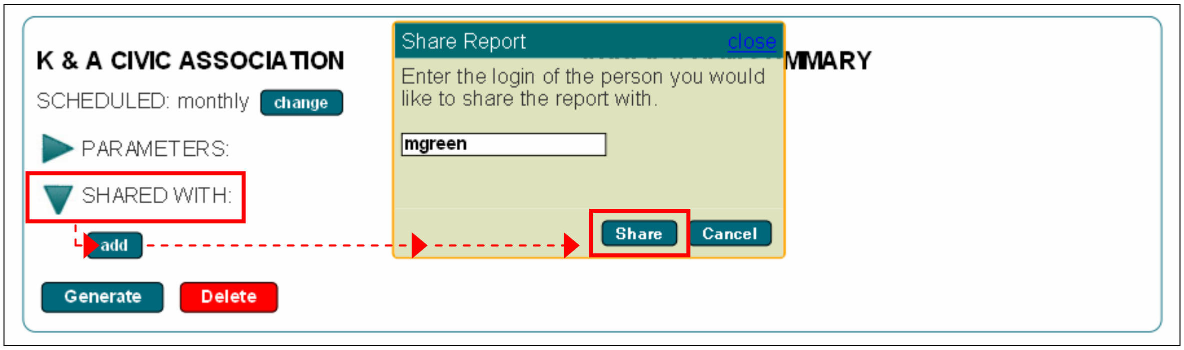


The available parameters are:

- **Report Type** - Affiliate Summary, Application or Application by Counselor, Organization, Tax Summary, User Report, User by Organization.
- **Organization** - Affiliate, Host or Site.
- **Include Affiliated Sites** - Consider the scale of your request before submitting. Reports on expansive networks take a long time to process and may be too large to arrive in your inbox. To ensure these reports arrive in a timely manner break your big request down into a several smaller requests.
- **Summary Only -** If the information requested does not need to be broken down by site, use the summary only filter. This quickly provides a one page summary of all of the sites within the network faster than if it is requested individually and listed on separate tabs. Summary Only reports are applicable only to the Affiliate report.
- **Title** (optional) **-** Reports by default are titled with the name of the organization unless you choose to enter another name.
- **Date Range -** The smaller the selected date range of the report, the less work required to process and the faster it will be sent to you. All reports contain a year-to-date (YTD) summary where applicable. If you are only interested in YTD totals, choose the smallest date range that will provide you with that data. For example, choosing a range of May 27, 2010 through May 27, 2010 will give you a YTD summary from January 1, 2010 through May 27, 2010.
- **Client Conditions -** Age, Gender, County, Zip Code, Immigrant, Marital Status, Monthly Income.
- **Site Conditions -** City, County, Zip, State, Case Management, Community-Based Organization, Correctional Institution, Educational, Employer, Faith-Based, Government, Health Services, Homeless Shelter, Mental Health Center, Reception Center, Social Service, Union, Re-Entry Program, United Way, Community Action Agency, Congressional District, State House District, State Senate District, Region, VITA.

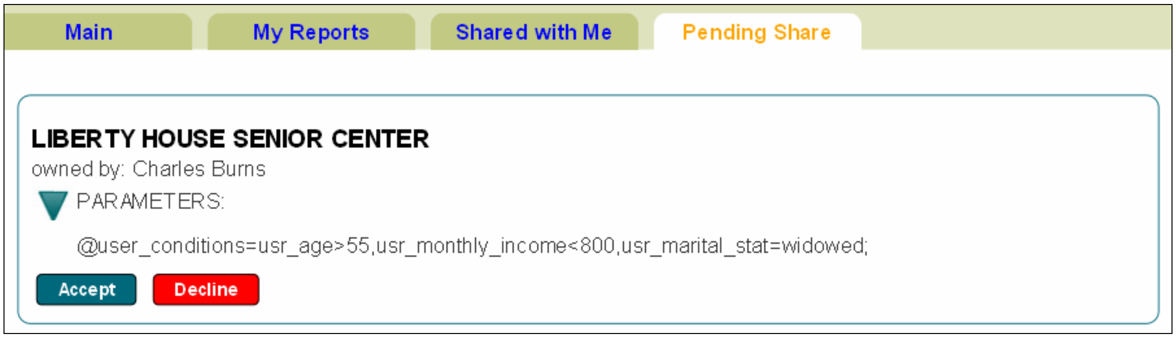
How to Share a Report

Permission to access reporting is limited to Site Administrators, but reports can be shared with anyone in the TBB network.
Any reports found under the "My Reports" tab can be shared with others using their TBB login name.

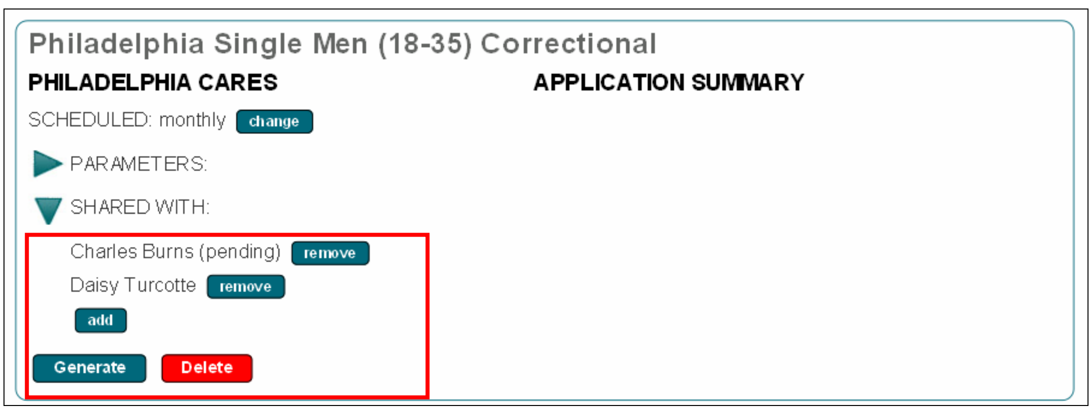


1. Click the green arrow to reveal the "add" button.
2. Click on Add to open the "Share Report" window.
3. Enter The Benefit Bank login name of the user.
4. Click Share.

An email is generated to the user(s) with the invitation and instructions for accepting. The report will await them for accept or decline in their “Pending Share” tab in the report portal.



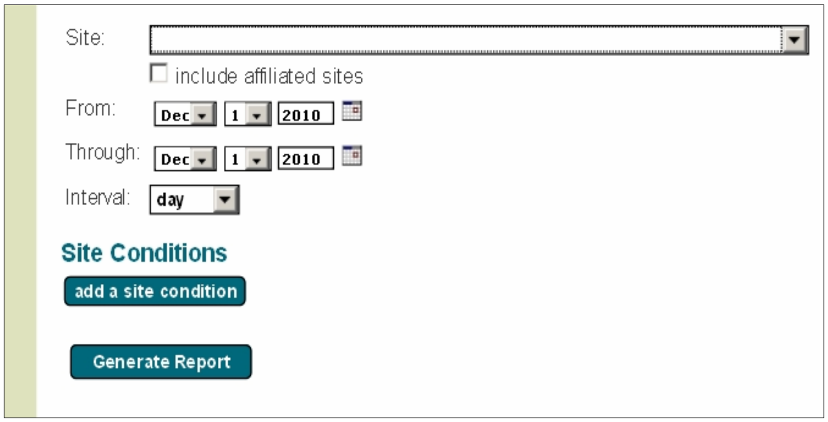
Visit the “My Reports” tab and click on the green arrow next to “Shared With” to view who you have shared reports with. Users who have not accepted the report are listed as “(pending)”.



How to View Graphs and Charts

Up to the minute information is provided through these visual graphs.

To access, click on View Graphs and Charts from the Main Tab in the report portal.



1. Using the drop down menu choose organization.

2. To include the entire network, check “include affiliated sites”.

3. Select the date range using the “From” and “Through” calendar options.

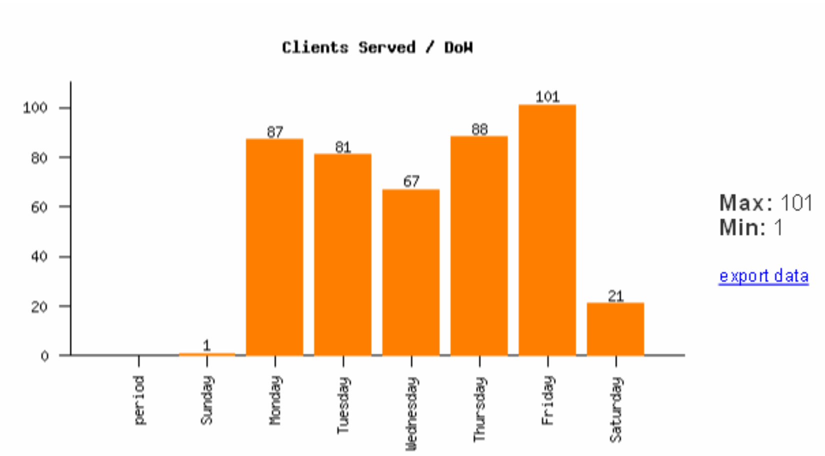
4. Choose interval of interest from day, week, month, quarter or year.

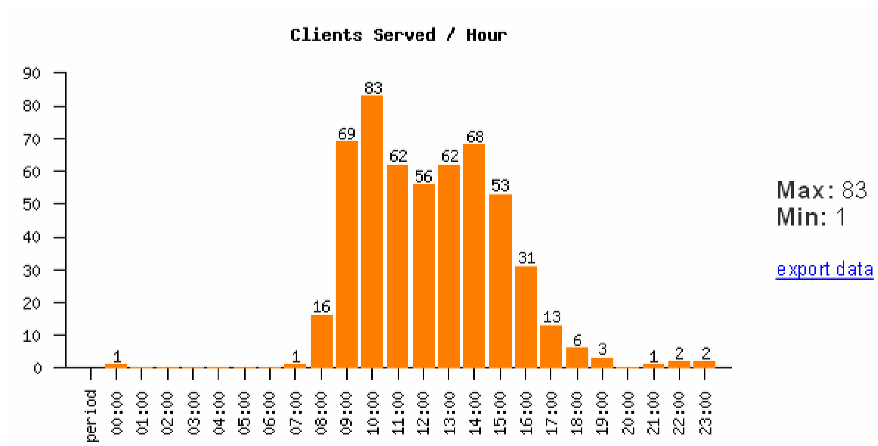
5. Click “add a site condition” to include one or more conditions from the following options: city, county, zip code, state or region.

The following graphs and charts will appear below after "Generate Report" is clicked: Clients Served/Interval, Total Applications Completed/Interval, Applications/Returns Completed, Clients Served/DoW, Clients Served/Hour, Total Sites/Interval, Top Sites, Total Counselors/Interval, Total Applications Completed/Counselor.

The information within the charts and graphs can assist you in many ways, for example:

Pairing **Clients Served / DoW** (Day of Week) with **Clients Served / Hour** informs you on your busiest days and times to assist you with scheduling your staff and volunteers.



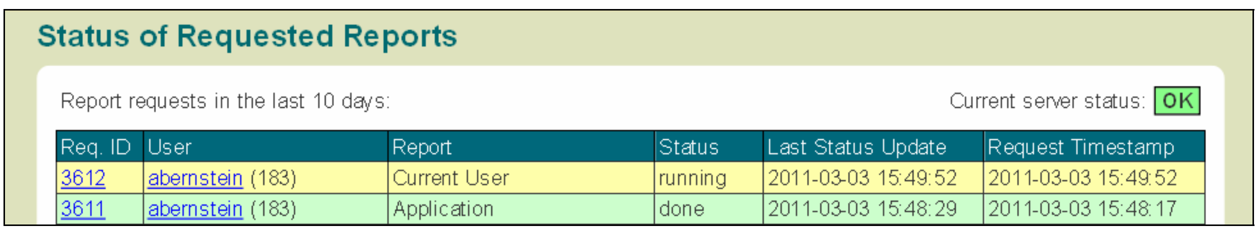


Checking the Status of Requested Reports

After you generate a report, it may take some time for it to arrive in your inbox. This is dependent on server capacity and how many other users are requesting reports at the same time.

You can track the status of your requested reports by clicking on “Generated Report Status” From the “Main Tab” on the Report Portal. This will allow you to track the status of a request you have made.

A color coded list of your requests will appear along with the current server status.



Status of Requested Reports

Report requests in the last 10 days:

Current server status: OK

Req. ID	User	Report	Status	Last Status Update	Request Timestamp
3612	abernstein (183)	Current User	running	2011-03-03 15:49:52	2011-03-03 15:49:52
3611	abernstein (183)	Application	done	2011-03-03 15:48:29	2011-03-03 15:48:17

Report request outcomes:

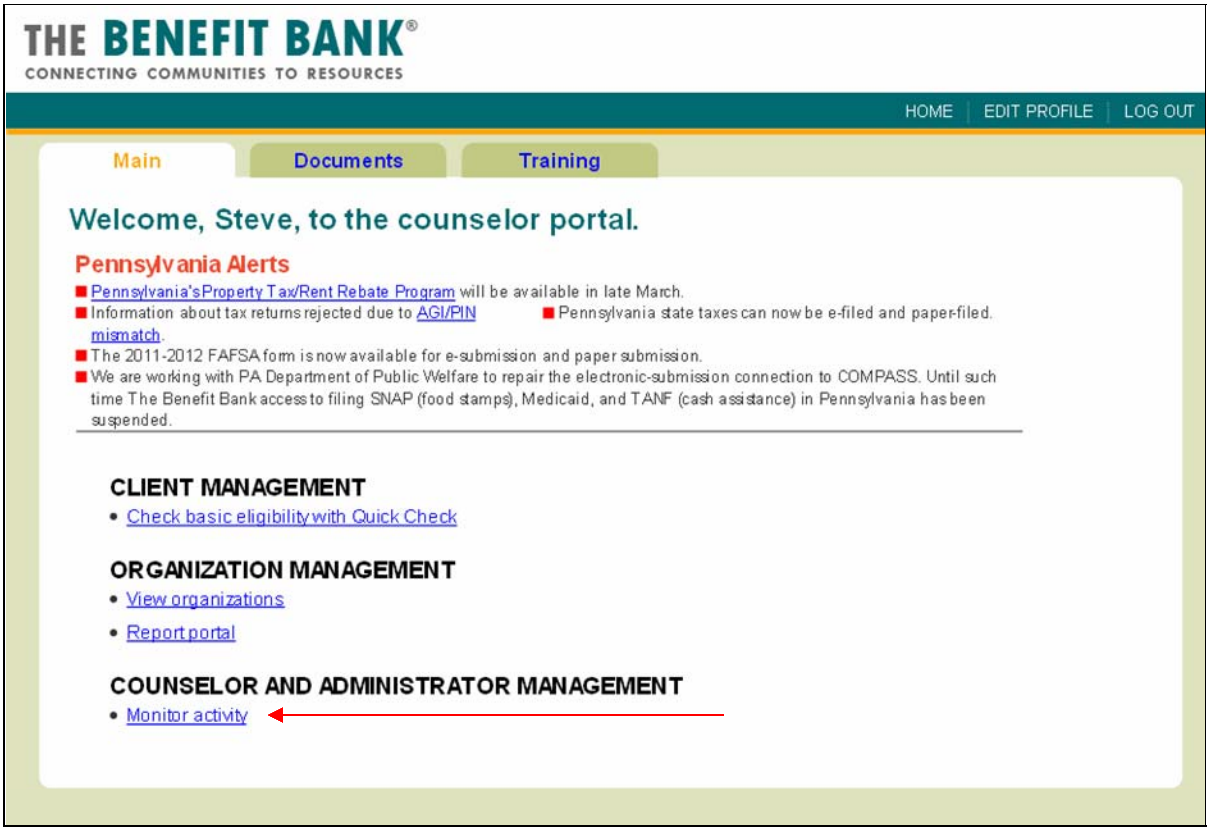
Requested (Blue) awaiting processing
Running (Yellow) processing
Done (Green) completed and sent
Error (Red) something went wrong

Current Server Status:

OK (Green) all is flowing smoothly
ERROR (Red) indicates an issue contact The Benefit Bank Help Desk

The Benefit Bank Activity Monitor

The activity Monitor indicates everyone (clients, users and administrators) who is currently logged into The Benefit Bank within your network.



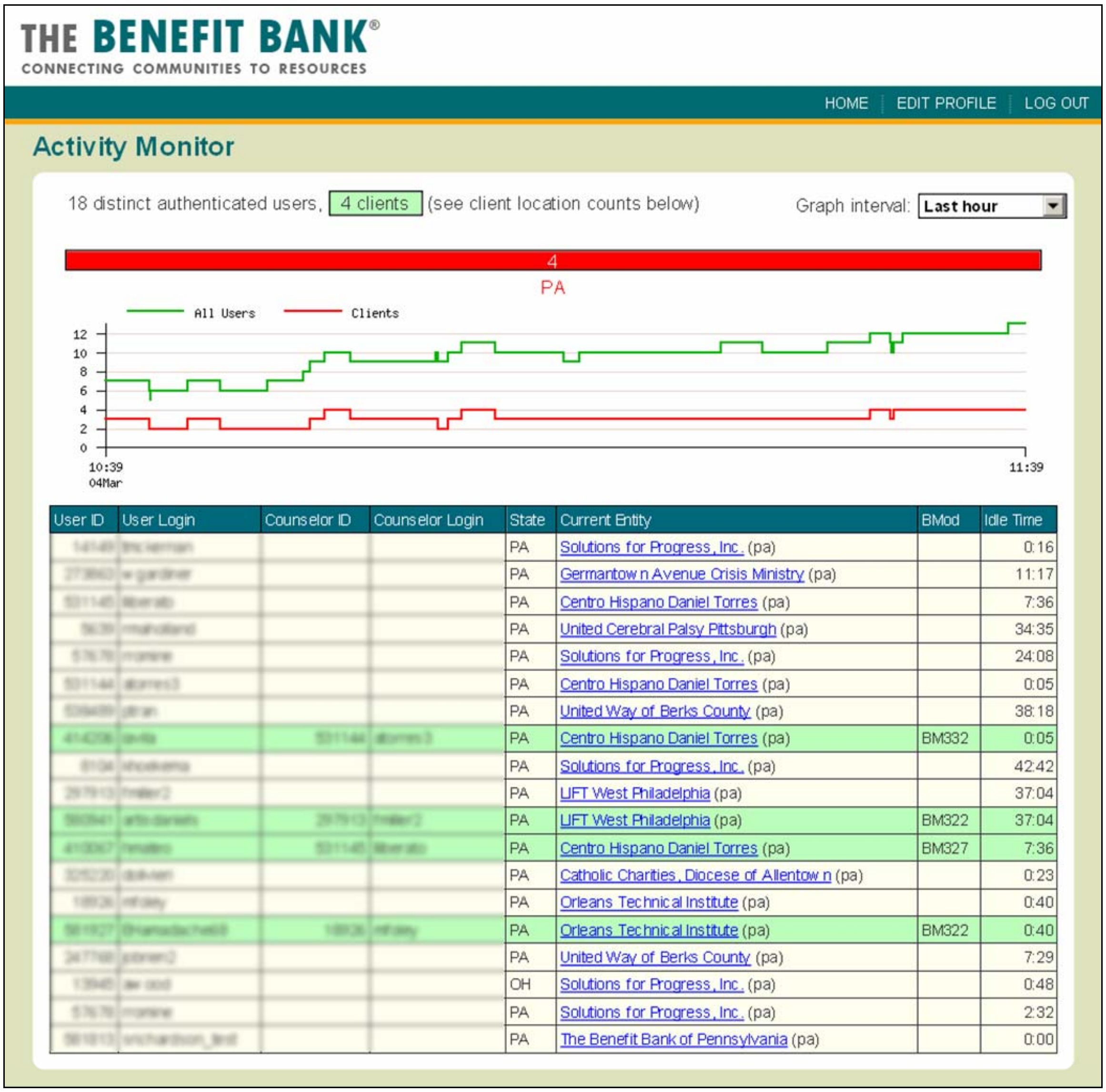
To access this tool, click on “Monitor Activity” located under Counselor and Administrative Management.

Clients who are being served by a counselor include the counselor information in their row.

The green line indicates all users currently logged into the system.

The red line indicates all clients (those assisted by counselors as well as self-serve).

Choose from the following intervals from: last-10 minutes, hour, 6 hours, 24 hours, or week.



User ID	User Login	Counselor ID	Counselor Login	State	Current Entity	BMod	Idle Time
[illegible]	[illegible]			PA	Solutions for Progress, Inc. (pa)		0:16
[illegible]	[illegible]			PA	Germantown Avenue Crisis Ministry (pa)		11:17
[illegible]	[illegible]			PA	Centro Hispano Daniel Torres (pa)		7:36
[illegible]	[illegible]			PA	United Cerebral Palsy Pittsburgh (pa)		34:35
[illegible]	[illegible]			PA	Solutions for Progress, Inc. (pa)		24:08
[illegible]	[illegible]			PA	Centro Hispano Daniel Torres (pa)		0:05
[illegible]	[illegible]			PA	United Way of Berks County (pa)		38:18
[illegible]	[illegible]	[illegible]	[illegible]	PA	Centro Hispano Daniel Torres (pa)	BM332	0:05
[illegible]	[illegible]			PA	Solutions for Progress, Inc. (pa)		42:42
[illegible]	[illegible]			PA	UFT West Philadelphia (pa)		37:04
[illegible]	[illegible]	[illegible]	[illegible]	PA	UFT West Philadelphia (pa)	BM322	37:04
[illegible]	[illegible]	[illegible]	[illegible]	PA	Centro Hispano Daniel Torres (pa)	BM327	7:36
[illegible]	[illegible]			PA	Catholic Charities, Diocese of Allentown (pa)		0:23
[illegible]	[illegible]			PA	Orleans Technical Institute (pa)		0:40
[illegible]	[illegible]	[illegible]	[illegible]	PA	Orleans Technical Institute (pa)	BM322	0:40
[illegible]	[illegible]			PA	United Way of Berks County (pa)		7:29
[illegible]	[illegible]			OH	Solutions for Progress, Inc. (pa)		0:48
[illegible]	[illegible]			PA	Solutions for Progress, Inc. (pa)		2:32
[illegible]	[illegible]			PA	The Benefit Bank of Pennsylvania (pa)		0:00

Help Desk

The Benefit Bank provides a Help Desk that responds to phone and email inquiries from counselors and site administrators.

Contact the Help Desk when:

- You forget your login name
- The online service is not responsive or not acting as expected
- You get an error message

	**tbbhelp@thebenefitbank.com**
	Main number: **(855) TBB-HELP** **(855) 822-4357**
	**9 AM – 5 PM EST**, Monday – Friday (Extended hours during tax season)