



Making the Most of The Benefit Bank's Reporting Tools

The Benefit Bank® (TBB™) has built in reporting tools that allows a Site Administrator or other designated person to track a site's activity. Below are several examples of how to use TBB's Reporting tools.

Performance at a Glance

Enter the Report Portal and then select *Site Summary Graphs* underneath the Tools section. This reporting feature provides quick access to a number of measures of your site's performance with helpful charts or graphs (if you have affiliate sites be sure to check the box below your organization's name), including:

- Clients served by defined time intervals (day, week, month, quarter, year)
- Total applications by defined time intervals (day, week, month, quarter, year)
- Summary applications/returns completed
- Clients served by day of the week
- Clients served by hour of the day
- Total sites by month (for organizations serving as host sites)
- Top sites by: clients served, clients with application/return completed, applications/returns completed
- Total counselors per month
- Total applications completed by counselor (number and percentage)

Data for each of these charts can be exported to excel by selecting the "export data" hyperlink next to each graphic.

Requesting Customized Excel Reports

1. Counselor Activity: Select the Generate/Save a Spreadsheet Report under the Tools section of the Report Portal. Select the report option called the *Application Summary for All Counselors*, which generates an excel report of a site's activity broken down by counselor. This is another method of identifying high performing counselors that are serving the most clients and completing the most applications. Notice and reward high performing counselors and provide additional support to counselors not serving as many clients. Consider partnering high and low performing counselors together (especially in the case of volunteers) to learn from each other. High

performing counselors may be your site's biggest supporters. Encourage them to recruit their friends or help with marketing.

2. Affiliate Summary Report: Running the [Affiliate Summary Report](#) gives an overview of the site's activity all in one place. In addition to reporting on number of clients served, number of completed applications broken out by type, detailed statistics on tax filers, the report also estimates the value of the supports claimed (for those supports with direct monetary value like FNS). Use this data to generate quarterly updates on your organization's success as a TBB-NC site for your organization's board of directors, staff, and volunteers. Consider setting goals for number of applications completed or total value of supports claimed.

3. Summary of Tax Season Activity by Site: Select the [*NEW* Generate/Save a Spreadsheet Report](#) link under the Tools section of the Report Portal. Select the report option called the [Tax Summary by Site for Current Tax Year](#), which generates an excel report on a site's performance. This report will be most helpful for organizations that manage a network of sites.

Need Help Running a Report? Read: [The Benefit Bank Reporting Guide](#)

Trouble Understanding the Reports? Read: [Understanding the Affiliate Summary Report](#)