

# REPORTS

2025-05-27

Based on a training video by HUB

Recorded by:  
Brazell, Laura

Organized by:  
Brazell, Laura

- Log into the HUB Impact website with your unique login
- Go to the Reports tab to see all the available reports

er) - **John Doe**

The screenshot shows a navigation bar with two tabs: 'Reports' (selected) and 'Tools'. Below the 'Reports' tab, a dropdown menu is visible, listing the following reports:

	Billing Statement	
	Branch Summary Report	
Eff	Branch Report	I
1/1	Account Scorecard	[
	Loan Officer Report	
1/1	Loan Officer Scorecard	[
	Loan Officer Incentive Report	
4/1	Claims Detail Report	[

- **Billing Statement**
  - Can be run at any point during the month to view the pending enrollments and cancellations that have been processed. You will not pay from this report, but from the auto generated statement sent at the beginning of each month.
- **Branch Summary Report**
  - Gives the total dollar amount generated by each branch during the date range entered
- **Branch Report**
  - Gives more details for each enrollment that was entered during the date range selected
- **Account Scorecard**
  - The total number of enrollments for the date range entered
- **Loan Officer Report**
  - Has a summary tab and then a tab for each Loan Officer's production for the date range entered. This report includes cancellations.
- **Loan Officer Scorecard**
  - Lists a total number of enrollments entered by a Loan Officer during the date range selected.
- **Loan Officer Incentive Report**
  - Will list the incentives due to each Loan Officer during the date range entered. This only populates if your financial institution has an incentive loaded in the Impact program.
- **Claims Detail Report**
  - Lists the number of claims paid during the month or date range entered.