Year-End Processes Checklist

Year-end reporting provides critical data to measure your practice performance during the past year. To make the most of your year-end data you'll want to understand your financial position, review your performance, set your goals, and make plans to execute.

We've created a checklist to help ensure your practice covers all of the reporting bases when closing out this year.

Not sure how to complete an item? Check out the Impromed **Year-End Processes** document for detailed instructions.

- ☐ **Inventory**
    - ☐ Inventory Count
    - ☐ Update Prices
- ☐ **Communication Searches**
    - ☐ Holiday Card
    - ☐ Top Spending/Most Visits Clients for the Year
- ☐ **Complete all transactions and adjustment** to accounts for the current Year; if using **Mobile Edition**, sync all devices
- ☐ **Print** suggested **Reports**
- ☐ **Year End Process**
    - ☐ Create a Year End folder for the current year (i.e., YE2022)
    - ☐ Print Reports/Export Reports to the Year End folder
        - ☐ Inventory Category Totals
        - ☐ Summary Report
    - ☐ Make a backup to the Year End folder
    - ☐ Run the Year End tool
- ☐ **Copy** the **Year End backup** to a removable media for safe keeping