



# Year-End Processes Checklist

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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 Avimark **Year-End Processes** document for detailed instructions.

**Inventory**

Inventory Count

Update Prices

**Communication Searches**

Holiday Card

Top Spending/Most Visits Client for the Year

**Complete all transactions and adjustment** to accounts for the current Year; if using **Sidekick**, sync all devices

**Print suggested Reports**

Make a **Year End backup**

**Update the Inventory Fiscal Year Start Date; adjust the Inventory Report** prompt, if needed, for a different time of year

**Copy the Year End backup** to a removable media for safe keeping