



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 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