



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