

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 adjustments** 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., YE2024)

☐ 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