

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