

# Year-End Checklist



- ☐ Extend staff shifts into the new year
- ☐ Use a break to block off upcoming holiday vacation dates
- ☐ Use a break to block off upcoming 2022 public holidays
- ☐ Reset patient insurance claims for 2021
- ☐ Provide patients with a statement of account for appointments (upon request)
- ☐ Export Inventory Report on last day of the clinic being open for 2021 (for a snapshot of inventory at that time) for future reference
- ☐ Make pricing changes to treatments or products on the last day of the clinic being open (all prices will be changed moving forward)
- ☐ Provide your bookkeeper with a copy of the Billing Summary Report
- ☐ Download a detailed breakdown of line items from the Sales Report (accrual) or Detailed Compensation Report (cash) depending on the accounting method
- ☐ Download detailed payment line items from the Transaction Report or payment summary from Daily Transaction Report
- ☐ Follow up on outstanding balances with A/R Report
- ☐ Encourage patients to settle up their balances by either emailing an invoice or by the Pay Balance email (Jane Payments)
- ☐ Write off any outstanding balances you do not want to carry forward into the new year
- ☐ Another year wrapped! Time to sit back, relax and celebrate a job well done. 🎉