

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 [here](#) for detailed instructions.

Inventory

- Inventory Count
- Update Prices

Communication Searches

- Holiday Card
- Top Spending/Most Visits Clients for the Year

Complete all transactions and adjustment to accounts for the current Year; if using Mobile Edition, sync all devices

Suggested Reports to Print

Year End Process

- Create a Year End folder for the current Year (ex: YE2019)
- Print Reports/Export Reports the 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