

BEST PRACTICES

Close the Year Out Strong

Checklist

Prepare your practice for a successful close to the year and a smooth start to the next with this handy checklist!



Section 1. Everything That Must Be Done Before Year-End

1. Plan Staff Schedules & Holiday Coverage

- Organize shifts and time-off requests in advance.

2. Review & Follow Up on Outstanding Treatment Plans

- Contact patients with incomplete treatments.
- Remind patients about expiring insurance or flex spending.
- Prioritize scheduling high-value procedures.

3. Team Recognition & Culture Building

- Plan staff appreciation gestures.
- Conduct a year-in-review huddle.
- Write thank-you notes to your team.

4. Patient Communication

- Encourage early rescheduling around holidays.
- Reinforce cancellation and no-show policies.

5. Engage Patients with Year-End Communication Campaigns

- Send thank-you notes to patients.
- Schedule holiday messages.
- Promote end-of-year offers or referral programs.

6. Manage Inventory & Supplies

- Audit supplies.
- Order essentials to cover holidays and early 2026.

7. Complete Year-End Financial & Admin Tasks

- Close accounts receivable.
- Review outstanding patient balances.
- Submit insurance claims on time.
- Review budget and financial goals.

Section 2. Prep for 2026

1. Reflect and Strategize for Next Year

- Review metrics (production, collections, retention, case acceptance).
- Set goals and plan 2026 campaigns.

2. Audit and Update Process Documents

- Refresh phone scripts, intake forms, and templates.
- Document protocols for unscheduled treatments.
- Update onboarding guides for new hires.
- Refresh patient communication templates.

3. Refresh Online Presence

- Review website for outdated info.
- Review and update directory profiles.
- Audit and respond to reviews.



January 2026

S	M	T	W	T	F	S
28	29	30	31	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31