

## 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- ☐ Review website for outdated info.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.

