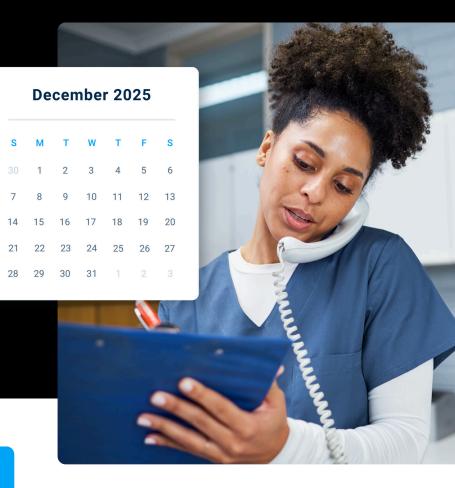


BEST PRACTICES

Year-End Essentials Checklist



We know the end of the year can feel overwhelming, but checking off these essential to-dos will make a big difference. Knock them out now, and you'll head into the holidays with less stress and more peace of mind knowing the most important things are handled.

1. Communicate Holiday Hours

- Update your website, Google Business Profile, signage, and patient notifications.
- Adjust online scheduling to reflect closures.

2. Check Insurance & Benefits

Send reminders about expiring benefits and flex spending accounts.

3. Follow Up on Outstanding Treatment Plans

Contact patients with incomplete treatment and schedule key procedures.

4. Submit Year-End Financials

Close accounts receivable and submit outstanding insurance claims.

5. Order Supplies

Ensure you have enough inventory to cover the holiday season and early January.