

BEST PRACTICES

Year-End Essentials Checklist

December 2025

S	M	T	W	T	F	S
30	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	1	2	3



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.