

Year-End Procedures

When year-end arrives, there are some tasks that **MUST** be done prior to beginning a new year and some that are recommended but not required.

Required Procedures for Year-End

- Post everything that you want reflected in the current year: Charges, payments, adjustments, refunds, etc.
- Run any reports that rely on current ageing or YTD totals.
- Run the yearly clear.
 - It is not necessary to run the daily or monthly clears as the yearly clear performs all three clears.
- Label your last backup for the year as the year-end backup and archive it off-site.

Recommended Procedures for Year-End

- Run monthly reports as usual, including the monthly practice summary report for the year.
 - To print the monthly practice summary report, click **Monthly Statistics** on the *Main Menu*, then click .
 - Click Enter on Print a **Monthly Practice Summary Report**.
 - On the next screen the default dates are already the first day of the current year till today.
 - Click **Print Report**.
- Print your fee schedule before performing the yearly clear so you can get YTD totals for all procedures.
 - On the *Main Menu* click **Procedure Codes**.
 - Click **Print Fee Schedule**.
 - In the **Report format** section click **Print fee schedule only** and change to **Include accumulated totals**.
 - Click **Print Report**.
- Remove old schedule blocking.
 - On the *Main Menu* click **Appointments and Recall**.
 - Click **Block Out Appointment Book**.
 - Click and answer Yes to “Do you want to purge old schedule columns?”
 - Confirm you want to proceed and enter the date that you want to use for purging old schedule records.
- Reorganize files.
 - On the *Main Menu* click **File Maintenance**.
 - Click **Reorganize Files for Faster Access**.
 - Click to reorganize **Names, Charts & Notes, Schedule, Zip codes, Procedures, Months, and Fee schedule**.

Questions? Contact the staff at Datacon for help.

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