END OF YEAR PROCEDURES

Your Data Team program will function better if you do a little housekeeping at the end of the year.

1. **Recalculate Accounts Receivable:** in the Transactions menu, go to Utilities and select Recalculate Accts Rec. Accept the defaulted range of patients. After you have determined no other Data Team program is running in the entire office, change the bullet to "Yes" then click on OK. This activity adds each entry in each account to give you an accurate accounting of the total amount owed your practice. There will likely be a difference but what you recalculate is the real AR.

2. **Final Day Sheet:** After the last entry for the year, print a Day sheet from Day-End Reports. This is the **only** time your accounts receivable will show this day's actual AR.

3. **Year-to-Date:** While in the Day-End Reports, print the Year-to-Date report. Select the appropriate year in this report if not the current year.

4. **Production Summary:** Production summary gives you a list of the number of each procedure performed, the total fees, and percentage of the total production attributed to each for the period you select. Enter 1/1to 12/31 of the current year. Check Include Purged Transactions. No number in the practitioner box will give the production for the entire office. Get a summary for practitioners by putting in their practitioner number.
   You will need to have a security code of 5 in your System Settings in order to get into this section.

5. **Archive Transactions:** In Transactions, go to Utilities. Choose Archive Transactions. The default date shown will be 12/31 of two years ago. We recommend using the default. The data is moved from the active transaction file to an archive file. This archived data is always viewable using the Family Ledger Report.

6. **Clean Up:** In Utilities select Clean Up. This screen will show you all Treatment Plans, Employers, Insurance Plans, and Insurance Companies no longer being used. Clean Up removes these fragments from your computer.