IRIS | Practice Engine

QUICK REFERENCE GUIDE

PERIOD END

The Period End process can be managed and run from the Periods page of the Admin menu. This Quick Reference Guide provides the steps required to run the period end.

PERIOD END CHECKS

- Ensure all timesheets have been posted for the period.
- Check that there are no draft bills or credit notes on the system that require posting.
- Ensure that all receipts and deposits for the period have been processed and posted.

PERIOD MAINTENANCE

- Ensure that the next period is created and set up correctly.
- If the next period needs to be set up, right click on the current period and select **Add New Period** from the context menu.

ANALYSING THE PERIOD

- Select the Periods page from the Admin menu.
- Select the current year.
- Right click on the period that requires analysing and select **Analyse Period**.
- Review the Warnings or Information symbols and take the appropriate action as required.

RUNNING THE PERIOD END

- Click onto the **Lock Down** button.
- Run any reports that are required by the Practice.
- Click onto the **Run Period End** button.
- Click onto the **Unlock** button when all practice period end procedures have been completed.

More detailed information on creating new periods and the period end routine can be found in the Period End Administrators Guide.