



Practice Manager Year End Checklist

Review your records and get your practice organised for the end of the financial year

Here's our handy checklist to help get you started:

- Reconcile all balance sheet items as at 30 June, particularly bank accounts
- Organise year-end Payroll & Superannuation:
 - ✓ Pay all outstanding super for employees before 21 June 2026
 - ✓ Calculate any employee bonuses payable
 - ✓ Single Touch Payroll finalisation to be completed by 14 July 2026
- Review income & expense accounts to ensure explanations are clear
- Review receivables for any bad debts to write off
- If still applicable to your practice, clear the Practice Clearing Account and ensure all payments are made by 30 June
- Review depreciation schedule for obsolete Plant & Equipment assets and advise on items to be written off
- Review rental agreements and ensure that annual rent reviews have occurred
- Print a snapshot of all practice loan and bank account balances at 30 June
- Gather documents for any asset purchases or disposals during the year including copies of any lease or hire Purchase Agreements entered into
- Ensure you are ready for Payday Super to commence from 1 July 2026
- Consider the benefit of cloud software 'add-ons' for the next Financial Year, such as Hubdoc