Month End Close: How to utilize in my account

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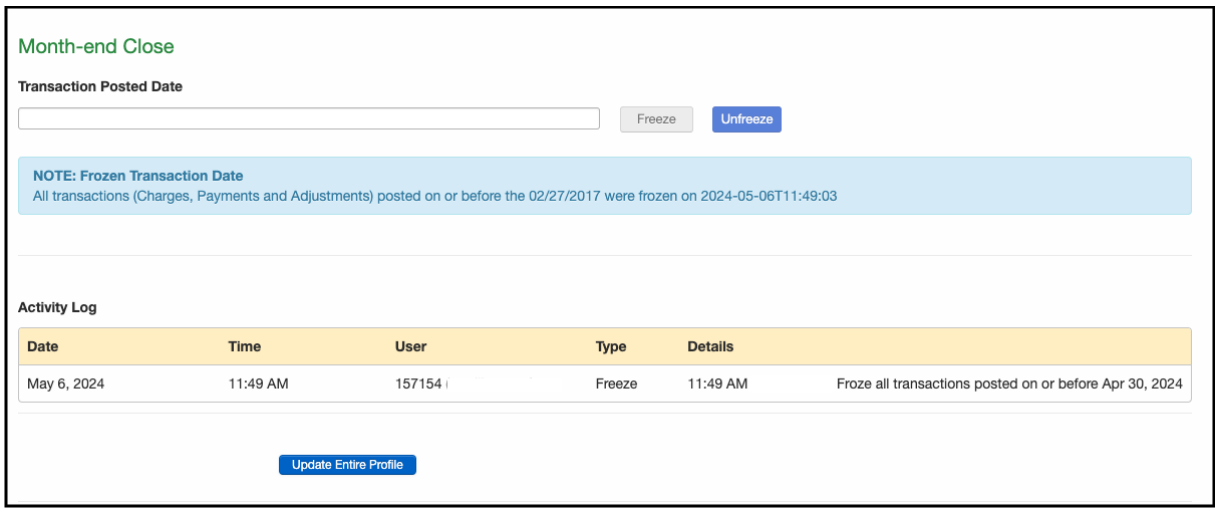
Those who have Billing Administrator Permissions in DrChrono and are on a plan other than Apollo Plus will see the Month-End Close, where you can select the date on which your account charges, payments, and adjustments will be frozen.

For those on a billing plan, this will be done automatically on the 5th of each month to freeze your charges, payments, and adjustments from the previous month.

1. Navigate to **Account > Account Settings**
2. Select the **Month-end close** tab

3. Here you will be able to freeze (and unfreeze if necessary) your transactions if you are not on a billing plan.

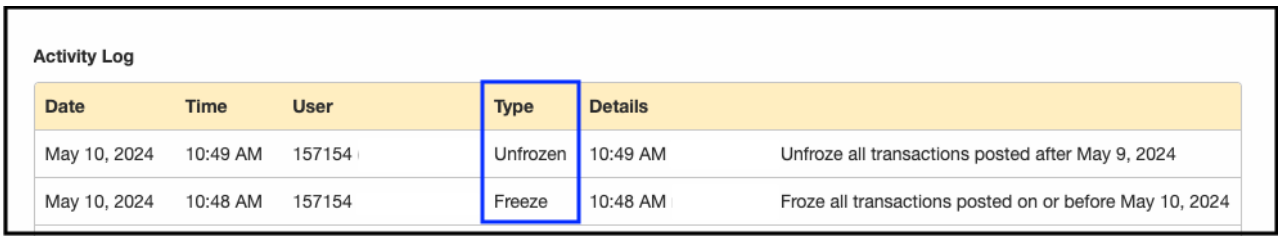


- **Transaction Posted Date box** - the default date shown will be the date your DrChrono account was activated. This date can be updated to any previous date. Once you enter a date, press **Freeze**. You will receive a pop-up box asking you to confirm. Once you select "Yes", the freeze date will be applied, and an entry in the Activity Log will be created.

- The **Unfreeze** Button will only be enabled if you have frozen transactions in the past. When you select it, a pop-up box will ask you to confirm. Once "Yes" is selected, the transactions will be unfrozen.
    - Please note that if transactions are unfrozen, transaction dates for charges and patient/insurance payments can be changed, potentially impacting any prior financial reports run.
    - You can select any date before the current date and press "Unfreeze". This will unfreeze transactions up to that date. For example, if transactions are frozen as of 4/31/2025 and the date of 4/28/2025 is entered and Unfreeze is pressed, all transactions posted between 4/29 and 4/31 will unfreeze.

Activity Log

Each time transactions are frozen or unfrozen, an activity log post will be created. You can see the date/time, the user, and what action they took, either freeze or unfreeze.



For all customers, except those on an Apollo Plus plan, you will need to go in **each month** to freeze the transactions for the previous month. At this time, it will not happen automatically.

- For example, if you want to freeze transactions for April, you will need to go in on May 1st and enter a transaction to freeze postings from April 30th and prior. This will ensure that any charges, insurance, or patient payments posted in April will appear on your financial reports. There will be no ability to change any transactions made in April while they are frozen.

For RCM billing customers

Transactions in your account will be frozen on the 5th of each month for the past month and all previous months. The ability to freeze or unfreeze charges will not be available. If you have any questions, please contact your RCM Account Manager.