

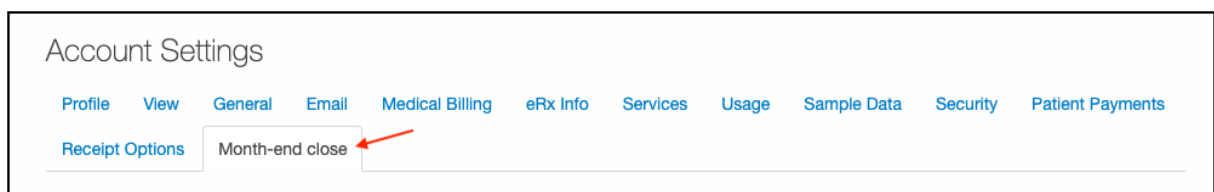
Month End Close: How to utilize in my account

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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 an Apollo Plus 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 tab **Month-end close**



3. Here you will be able to freeze (and unfreeze if necessary) your transactions if you are on a plan other than Apollo Plus.

The screenshot shows the 'Month-end Close' configuration page. At the top, there is a section titled 'Transaction Posted Date' with a text input field and two buttons: 'Freeze' and 'Unfreeze'. Below this is a blue informational box with the text: 'NOTE: Frozen Transaction Date All transactions (Charges, Payments and Adjustments) posted on or before the 02/27/2017 were frozen on 2024-05-06T11:49:03'. Below the box is an 'Activity Log' section with a table showing a single entry. At the bottom of the page is a button labeled 'Update Entire Profile'.

Date	Time	User	Type	Details
May 6, 2024	11:49 AM	157154	Freeze	Froze all transactions posted on or before Apr 30, 2024

- **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.

Freeze
✕

All transactions posted on or before 05/10/2024 will be frozen

Confirm

Cancel

- 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.

Unfreeze
✕

All transactions posted after 05/09/2024 will be unfrozen

Confirm

Cancel

Activity Log

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

Activity Log					
Date	Time	User	Type	Details	
May 10, 2024	10:49 AM	157154	Unfrozen	10:49 AM	Unfroze all transactions posted after May 9, 2024
May 10, 2024	10:48 AM	157154	Freeze	10:48 AM	Froze all transactions posted on or before May 10, 2024

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.

Month-end Close

Transaction Posted Date

FreezeUnfreeze

For Apollo Plus 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.
