

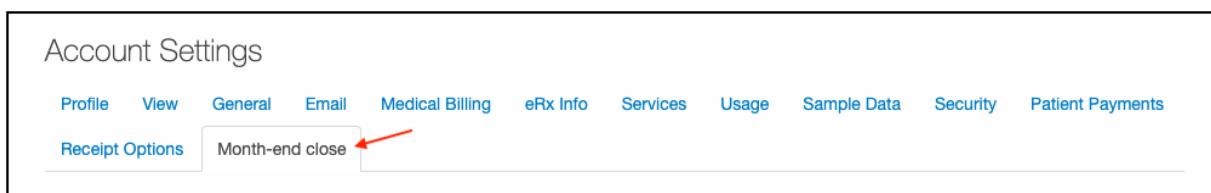
Month End Close: How to utilize in my account

Last modified on 01/16/2026 3:07 pm EST

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.

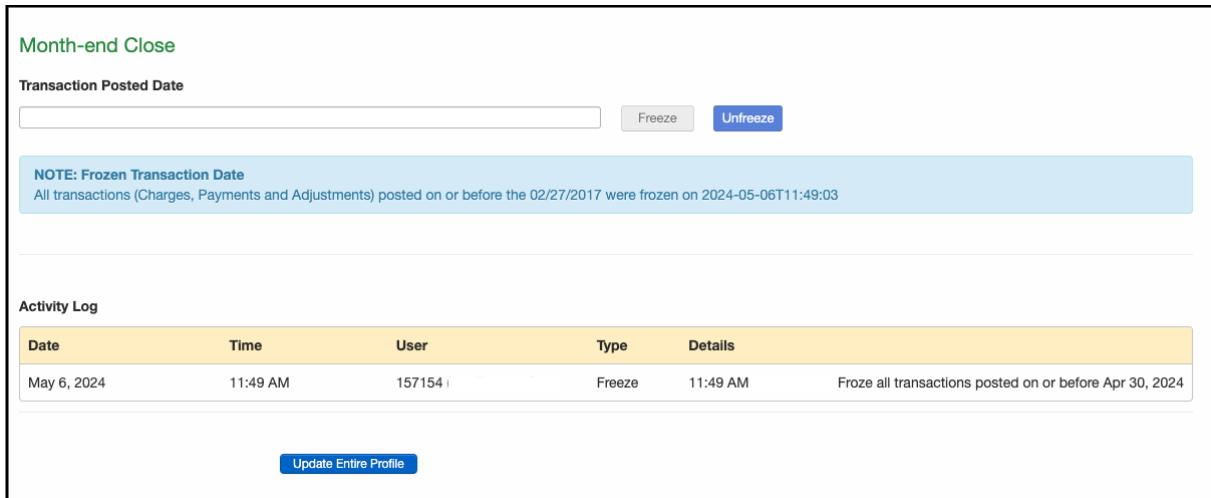
For those on an Apollo Plus plan, this will be done automatically on the 5th of each month to freeze your charges, payments, and adjustments from the previous month.

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



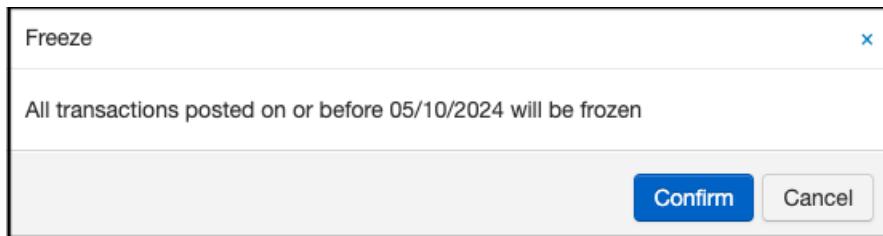
The screenshot shows the 'Account Settings' page. At the top, there is a navigation bar with tabs: Profile, View, General, Email, Medical Billing, eRx Info, Services, Usage, Sample Data, Security, Patient Payments, Receipt Options, and Month-end close. The 'Month-end close' tab is highlighted with a red arrow pointing to it.

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' page. At the top, it says 'Month-end Close'. Below that is a 'Transaction Posted Date' input field with a calendar icon. To the right of the input field are 'Freeze' and 'Unfreeze' buttons. A note below the input field states: 'NOTE: Frozen Transaction Date' and 'All transactions (Charges, Payments and Adjustments) posted on or before the 02/27/2017 were frozen on 2024-05-06T11:49:03'. Below this is an 'Activity Log' table with columns: Date, Time, User, Type, and Details. The table shows one entry: 'May 6, 2024 11:49 AM 157154 i Freeze 11:49 AM Froze all transactions posted on or before Apr 30, 2024'. At the bottom is a 'Update Entire Profile' button.

- **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 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

04/30/2024

Freeze

Unfreeze

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.
