Customized Follow-up Dates: Utilizing within your account

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Using in your Account

DrChrono has added a feature that allows you to customize the follow-up date on an individual claim basis. This feature must first be set up for your account by your DrChrono billing administrator.

Once enabled, here is how you can utilize the feature:

As a default, the follow-up date box in the Live Claims Feed (**Billing > Live Claims Feed**) is grayed out and set to 35 days in the future for all claims.



Software Customers

Your DrChrono billing administrator can set the maximum number of days for all of your appointments. It can be anywhere between 1 and 90 days. Once the limit is set for the account, follow-up dates on individual appointments can be updated as long as they fit within the parameters set for the account. The date cannot be a past date.

Once a follow-up date is updated, a note will be logged in the billing notes stating what the date was and what it was changed to, along with the date, time, and username of the person making the change.



Billing Customers

Multiple billing statuses will open the follow-up Date field, allowing the user/biller to override the pre-set 35 days up to the maximum set for your account. This work will be done by billers assigned to your account.

Two statuses have a pre-set follow-up date range. They are **Authorization Requested (14 calendar days) and Voicemail Follow-up (7 calendar days).** All other statuses will default to the standard 35 days unless the office

administrator sets a custom follow-up date range and the date is updated by a user. The date must be in the future - no past dates are allowed.