Month End Close: Freezing charges each month

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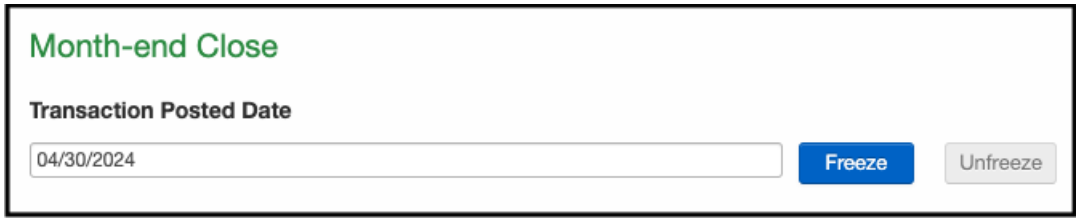
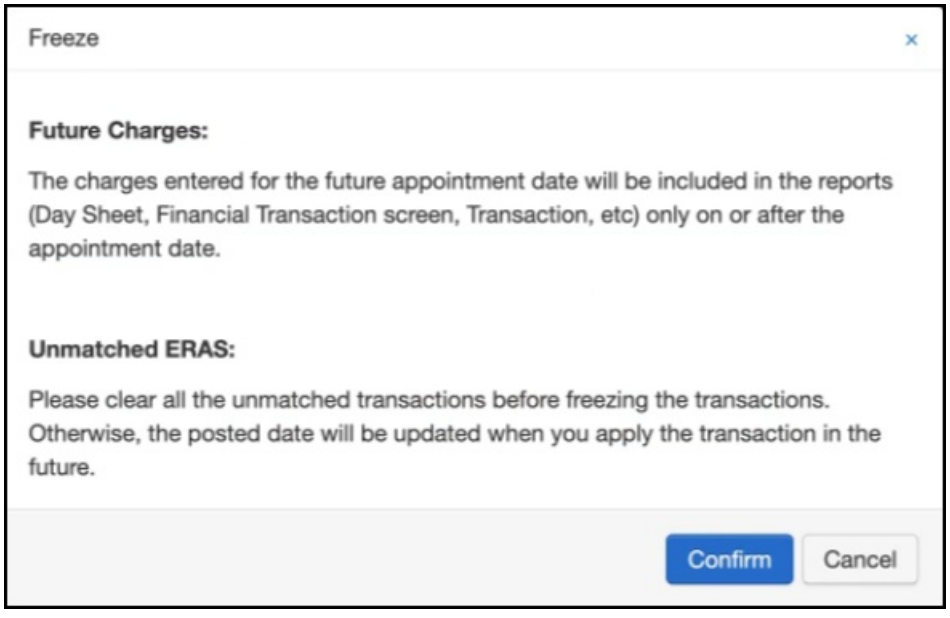
For all customers, except those on a billing plan, you will need to go in **each month** to freeze the transactions for the previous month. At this time, it will not happen automatically.

- 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.



The first time you freeze transactions in your account, you will see the following message: