Customized Follow-up Dates: Reporting

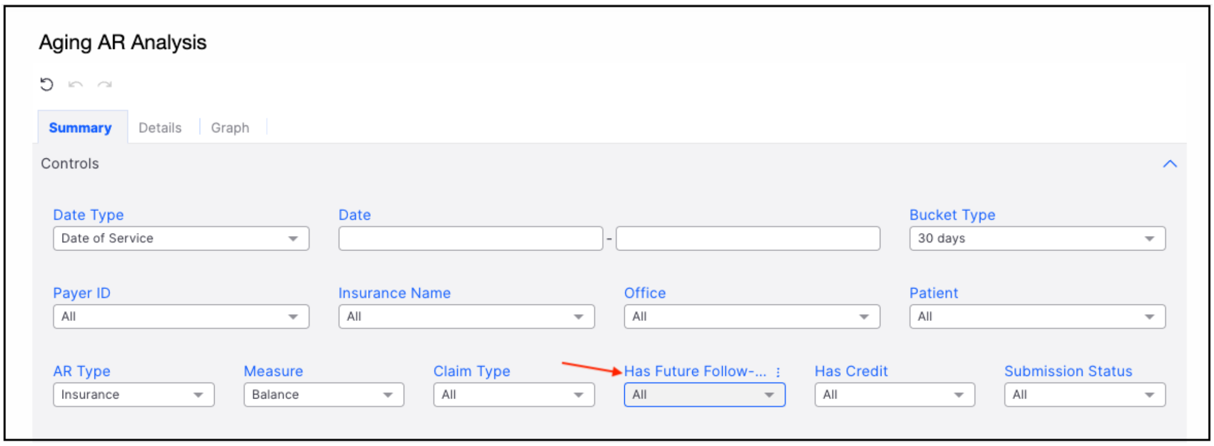
Last modified on 11/01/2024 3:27 pm EDT

Follow-up Date Reporting

DrChrono has added functionality to customize claim follow-up dates based on the type of claim, the circumstances around the particular claim, or your office policies.

When you request reports on your accounts receivable, you have the option to exclude claims that have a future follow-up date.

1. Navigate to **Billing > Aging AR Analysis**



- The option is in the third row on the Summary tab.
  - **No** selected - You will receive data for claims that have a follow-up date in the past.
  - **All** selected - You will receive data for all claims, no matter when the follow-up date is.