

Customized Follow-up Dates: Reporting

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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 screenshot shows the 'Aging AR Analysis' interface. At the top, there are navigation icons and tabs for 'Summary', 'Details', and 'Graph'. Below this is the 'Controls' section, which contains several dropdown menus and input fields for filtering the data. The 'Has Future Follow-up' dropdown is highlighted with a red arrow, indicating the option to be selected.

Control	Value
Date Type	Date of Service
Date	[Empty]
Bucket Type	30 days
Payer ID	All
Insurance Name	All
Office	All
Patient	All
AR Type	Insurance
Measure	Balance
Claim Type	All
Has Future Follow-up	All
Has Credit	All
Submission Status	All

- 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.