

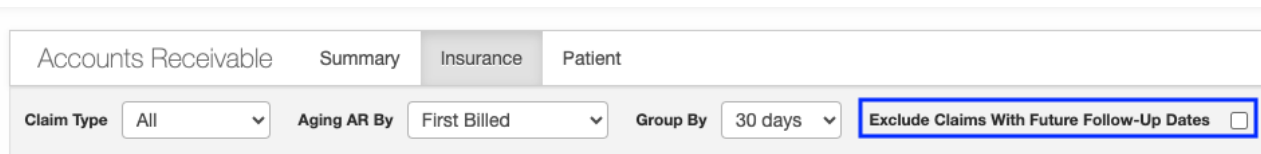
Customized Follow-up Dates: Reporting

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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.

- Navigate to Billing > Accounts Receivable



The screenshot shows the 'Accounts Receivable' reporting interface. It features four tabs: 'Accounts Receivable', 'Summary', 'Insurance', and 'Patient'. Below the tabs, there are four dropdown menus: 'Claim Type' (set to 'All'), 'Aging AR By' (set to 'First Billed'), 'Group By' (set to '30 days'), and 'Exclude Claims With Future Follow-Up Dates' (checkbox). The 'Exclude Claims With Future Follow-Up Dates' checkbox is highlighted with a blue border.

- The option is in the header row on both the Insurance and Patient tab.
 - Tab selected - You will receive data for claims that have a follow-up date in the past.
 - Tab not selected - You will receive data for all claims, no matter when the follow-up date is.