How Do I Add an Insurance EOB to my DrChrono account?

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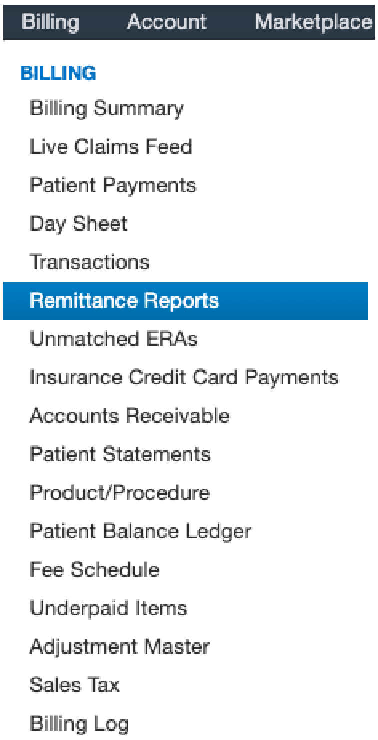
If you receive a paper explanation of benefits (EOB) from an insurance payer, the best practice is to scan the document, add it to your DrChrono account, and attach it to the patient's appointment(s) that are included on the EOB. The image will be available to answer any questions the office or the patient has about the claim adjudication. It can be viewed or printed as necessary.

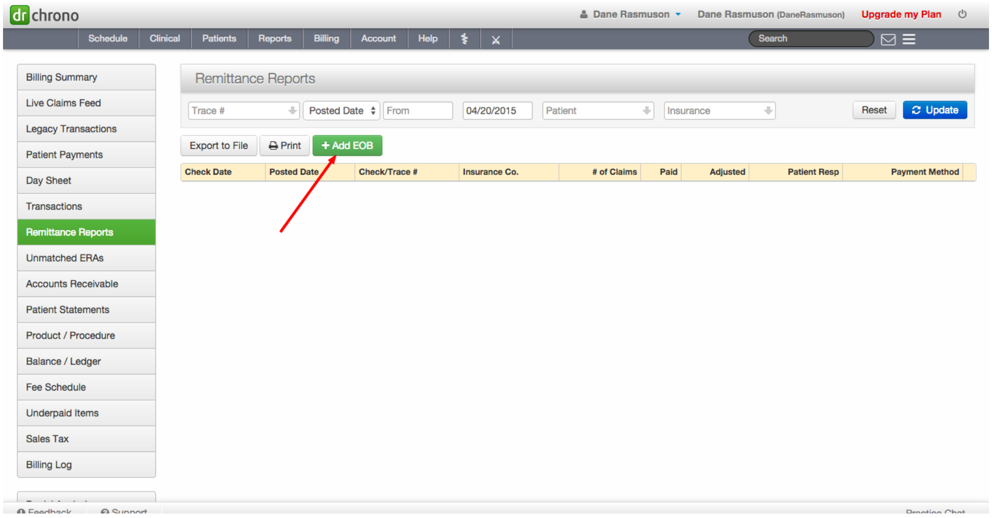
Here is how you can attach a paper EOB to your account:

1. Please log in to your DrChrono account.

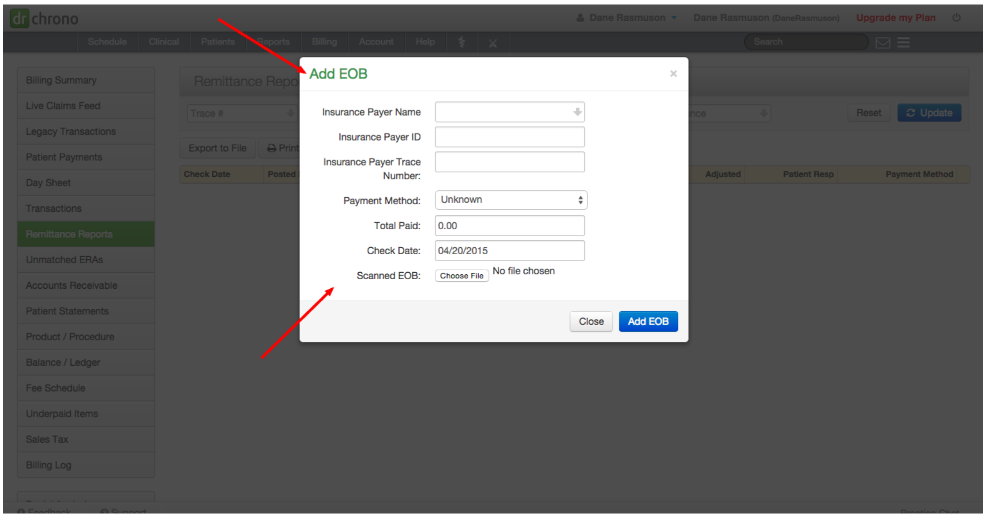
2. Hover your cursor over the **Billing** tab and choose **Remittance reports** from the drop-down menu:



3. Select the green **Add EOB** button:

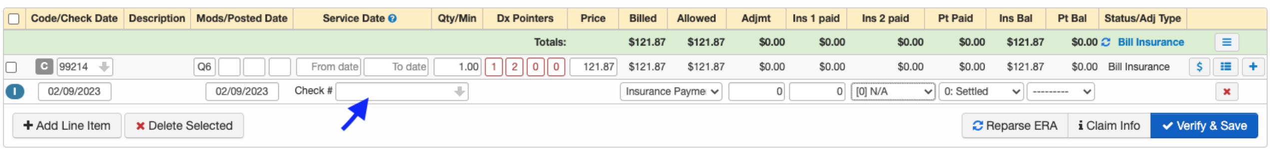


4. Enter the required information into the fields given:



5. Once you have entered the required information, including uploading the scanned EOB image, select the blue **Add EOB** at the bottom right of the window.

6. When posting to individual patient accounts, enter the check # as the same number you entered as the Insurance Payer Trace Number when adding the EOB to the system. This will attach the image of the EOB to the payment within the patient's account.



That's it! When the payment is posted to the patient's account, a magnifying glass will appear next to the check/trace number. Clicking on the magnifying glass will pull up an image of the explanation of benefits (EOB). It can be viewed or printed right from the Live Claims Feed.