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

07/24/2024 3:20 pm EDT

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:

Billing	Account	Marketplace
BILLING		
Billing S	ummary	
Live Cla	ims Feed	
Patient	Payments	
Day She	et	
Transac	tions	
Remitta	nce Reports	
Unmatc	hed ERAs	
Insurance	ce Credit Card	d Payments
Account	ts Receivable	
Patient	Statements	
Product	/Procedure	
Patient	Balance Ledg	er
Fee Sch	edule	
Underpa	aid Items	
Adjustm	ent Master	
Sales Ta	ix	
Billing L	og	

3. Select the green Add EOB button:

	Schedule	Clinical	Patients	Reports	Billing	Account Help						Search		
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Billing Sum	mary		Remittanc	ce Reports	3									
Live Claims	Feed		Trace #	+ •	Posted Da	te 🛊 From	04/20/2015	Patient		Insura	ince	+	Reset C Up	date
egacy Tra	nsactions				_									
Patient Pay	ments		Export to File	🕀 Print	+ Add									
Day Sheet			Check Date	Posted Da	e	Check/Trace #	Insurance Co.		# of Claims	Paid	Adjusted	Patient Resp	Payment Me	ethoo
Fransaction	IS													
Remittance	Reports													
Jnmatched	ERAs													
Accounts R	eceivable													
Patient Stat	ements													
Product / Pr	rocedure													
Balance / L	edger													
Fee Schedu	lle													
Underpaid I	items													
Sales Tax														

4. Enter the required information into the fields given:

dr chrono						
Schedule C						
Billing Summary	Remittance Repo	d EOB		×		
Live Claims Feed	Trace #	nsurance Payer Name		+	nce 🕂	
Legacy Transactions	Export to File	Insurance Payer ID				
Patient Payments		nsurance Payer Trace			Adjusted Patient Resp	
Day Sheet	Check Date Posted	Number:	Unknown	_	Adjusted Patient Resp	
Transactions		Payment Method:		\$		
Remittance Reports		Total Paid:	0.00			
Unmatched ERAs		Check Date:	04/20/2015 Choose File No file chosen			
Accounts Receivable	, I I I I I I I I I I I I I I I I I I I	Scanned EOB:	Choose File			
Patient Statements				Close Add EOB		
Product / Procedure						
Balance / Ledger						
Fee Schedule						
Underpaid Items						
Sales Tax						
Billing Log						
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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.

	Code/Check Date	Description Mods/Posted Date	Service Date (2)	Qty/Min	Dx Pointers	Price	Billed	Allowed	Adjmt	Ins 1 paid	Ins 2 paid	Pt Paid	Ins Bal	Pt Bal	Status/Adj Type	
					Totals:		\$121.87	\$121.87	\$0.00	\$0.00	\$0.00	\$0.00	\$121.87	\$0.00	C Bill Insurance	
	C 99214 🕂	Q6	From date To date	1.00	1200	121.87	\$121.87	\$121.87	\$0.00	\$0.00	\$0.00	\$0.00	\$121.87	\$0.00	Bill Insurance	\$ =
0	02/09/2023	02/09/2023	Check #	+			Insurance	Payme 🗸	0	0	[0] N/A	O: Settled	I V	v		×
	+ Add Line Item	× Delete Selected	7										Reparse ER	RA iCI	aim Info 🗸 🗸	erify & Save

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.