

How to archive an EOB/ERA.

07/24/2024 5:05 pm EDT

In DrChrono, there is no option to delete an EOB/ERA. However, we can archive them which will remove them from showing under your Remittance Report section.

To archive an EOB/ERA, Please follow the steps outlined below:

1. Hover over **Billing**.
2. Click on **Remittance Reports**.

The screenshot shows the 'Billing' menu with the following items: Billing Summary, Live Claims Feed, Patient Payments, Day Sheet, Transactions, **Remittance Reports** (highlighted in blue), Unmatched ERAs, Insurance Credit Card Payments, Accounts Receivable, Patient Statements, Product/Procedure, Patient Balance Ledger, Fee Schedule, Underpaid Items, Adjustment Master, Sales Tax, and Billing Log.

3. Enter the EOB/ERA number in the **Trace #** field, if you have it. You can also use posted date, or insurance to locate the EOB/ERA that you would like to archive.

The screenshot shows the 'Remittance Reports' interface. The 'Trace #' field in the search bar is highlighted with a red box. Below the search bar is a table with the following columns: Check Date, Posted Date, Deposit Date, Check/Trace #, Insurance Co., # of Claims, Paid, Adjusted, Patient Resp, Payment Method, and Action. The table contains 15 rows of data, all with 'Unmatched' status. The 'Trace #' field is highlighted with a red box.

Check Date	Posted Date	Deposit Date	Check/Trace #	Insurance Co.	# of Claims	Paid	Adjusted	Patient Resp	Payment Method	Action	
09/06/2016	09/06/2016		[EOB] 13462654	CBA Blue	0	Unmatched	\$200.00	\$0.00	\$0.00	Check	View EOB Update
07/13/2016	07/13/2016		[EOB] 13245781	CBA Blue	0	Unmatched	\$100.00	\$0.00	\$0.00	Automated Clearing House (ACH)	View EOB Update
07/12/2016	07/12/2016		[EOB] 324361097	Aetha	0	Unmatched	\$200.00	\$0.00	\$0.00	Automated Clearing House (ACH)	View EOB Update
06/21/2016	06/21/2016		[EOB] 54321153	CIGNA	0	Unmatched	\$200.00	\$0.00	\$0.00	Automated Clearing House (ACH)	View EOB Update
06/16/2016	06/16/2016		[EOB] 35736	Aetha	0	Unmatched	\$200.00	\$0.00	\$0.00	Automated Clearing House (ACH)	View EOB Update
06/15/2016	06/15/2016		[EOB] 34573	Aetha KY	0	Unmatched	\$200.00	\$0.00	\$0.00	Automated Clearing House (ACH)	View EOB Update
06/14/2016	06/14/2016		[EOB] 245676	AETNA PPO	0	Unmatched	\$50.00	\$0.00	\$0.00	Automated Clearing House (ACH)	View EOB Update
06/10/2016	06/10/2016		[EOB] 9817534	Anthem Blue Cross	0	Unmatched	\$200.00	\$0.00	\$0.00	Automated Clearing House (ACH)	View EOB Update
06/03/2016	06/03/2016		[EOB] 54238764	Aetha	0	Unmatched	\$100.00	\$0.00	\$0.00	Automated Clearing House (ACH)	View EOB Update
05/17/2016	05/17/2016		[EOB] 986895	Aetha	0	Unmatched	\$100.00	\$0.00	\$0.00	Automated Clearing House (ACH)	View EOB Update
05/15/2016	05/09/2016	05/17/2016	[EOB] 789654	Aetha	0	Unmatched	\$1,000.00	\$0.00	\$0.00	Check	View EOB Update
05/09/2016	05/09/2016		[EOB] 47465	Blue Cross Blue Shield of	0	Unmatched	\$100.00	\$0.00	\$0.00	Automated Clearing House (ACH)	View EOB Update

5. Select the EOB/ERA number from the drop and click on the "Update" button.

Remittance Reports

ERA & EOB | 1234567 | Posted Date | From | 10/12/2016 | Patient | Insurance | Reset | Update

Export | Print | Add EOB | Add EOB Batch | Upload ERA | 1 - 40 OF 40

Check Date	Posted Date	Deposit Date	Check/Trace #	Insurance Co.	# of Claims	Paid	Adjusted	Patient Resp	Payment Method	Action
09/06/2016	09/06/2016		[EOB] 13462654	CBA Blue	0	Unmatched	\$200.00	\$0.00	Check	View EOB Update
07/13/2016	07/13/2016		[EOB] 13245781	CBA Blue	0	Unmatched	\$100.00	\$0.00	Automated Clearing House (ACH)	View EOB Update
07/12/2016	07/12/2016		[EOB] 324361097	Aetna	0	Unmatched	\$200.00	\$0.00	Automated Clearing House (ACH)	View EOB Update
06/21/2016	06/21/2016		[EOB] 5432153	CIGNA	0	Unmatched	\$200.00	\$0.00	Automated Clearing House (ACH)	View EOB Update
06/16/2016	06/16/2016		[EOB] 35736	Aetna	0	Unmatched	\$200.00	\$0.00	Automated Clearing House (ACH)	View EOB Update
06/15/2016	06/15/2016		[EOB] 34573	Aetna KY	0	Unmatched	\$200.00	\$0.00	Automated Clearing House (ACH)	View EOB Update
06/14/2016	06/14/2016		[EOB] 245676	AETNA PPO	0	Unmatched	\$50.00	\$0.00	Automated Clearing House (ACH)	View EOB Update
06/10/2016	06/10/2016		[EOB] 9817534	Anthem Blue Cross	0	Unmatched	\$200.00	\$0.00	Automated Clearing House (ACH)	View EOB Update
06/03/2016	06/03/2016		[EOB] 54238764	Aetna	0	Unmatched	\$100.00	\$0.00	Automated Clearing House (ACH)	View EOB Update
05/17/2016	05/17/2016		[EOB] 989895	Aetna	0	Unmatched	\$100.00	\$0.00	Automated Clearing House (ACH)	View EOB Update
05/15/2016	05/09/2016	05/17/2016	[EOB] 789654	Aetna	0	Unmatched	\$1,000.00	\$0.00	Check	View EOB Update
05/09/2016	05/09/2016		[EOB] 47465	Blue Cross Blue Shield of	0	Unmatched	\$100.00	\$0.00	Automated Clearing House (ACH)	View EOB Update

6. Now, click on the blue EOB/ERA number, which appears as a hyperlink.

Remittance Reports

ERA & EOB | 1234567 | Posted Date | From | 10/12/2016 | Patient | Insurance | Reset | Update

Export | Print | Add EOB | Add EOB Batch | Upload ERA | 1 - 1 OF 1

Check Date	Posted Date	Deposit Date	Check/Trace #	Insurance Co.	# of Claims	Paid	Adjusted	Patient Resp	Payment Method	Action
02/01/2016	02/01/2016		[EOB] 1234567	Aetna	0	Unmatched	\$1,000.00	\$0.00	Check	View EOB Update EOB Delete

7. Click on Action and select Archive Transactions from the list.

ERA List 1234567 from Aetna

Trace Number 1234567 | Update

Trace # 1234567 | Payer Name Aetna | Payer ID 60054 | Total Paid 1000 | /\$0.00 | Unmatched

Check Date 02/01/2016 | Deposit Date | Payment Method Check | View EOB | Update EOB | Choose File | No file chosen | Update EOB

Remittance Reports | Action | 0 CLAIMS

No.	Patient	Ap	Check Date	Rejected	Billed	Adjusted	Co-ins	Pt Resp	Paid	Note	Status

- Print
- Export to File
- Read Source
- Export Source
- Archive Transactions**
- Unarchived Transactions

This will archive the entire EOB/ERA and remove it from view.