

# Sorting of ERA/Remittance Report Files

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While working through your ERA or Remittance Report Files, reviewing them in the order in which they were posted is helpful. This way a simple scroll can lead you to the exact remit you want.

1. All of your ERAs are located under **Billing > Remittance Reports**.
2. Once inside the Remittance Report Section, you will see the following header.



The screenshot shows the 'Remittance Reports' interface. At the top, there is a search bar with a settings icon. Below it are several filter fields: 'ERA & EOB' (dropdown), 'Trace #' (text input), 'Received Date' (dropdown), 'From' (text input), 'To' (text input), 'Patient' (dropdown), and 'Insurance' (dropdown). To the right of these filters are 'Reset' and 'Update' buttons. Below the filters are three action buttons: 'Export', 'Print', and '+ Add EOB'. Below these are two more action buttons: '+ Add EOB Batch' and 'Upload ERA'. At the bottom, there is a table header with the following columns: 'Check Date', 'Received Date', 'Deposit Date', 'Check/Trace #', 'Insurance Co.', '# of Claims', 'Global Adj', 'Check /EFT Amount', and 'Payment Method'.

3. All of your remits will automatically be listed, in order of posted date with the most current date first.
4. You can use the filters at the top of the screen to narrow your search if you want something specific. Your options include:
  - a. ERA, EOB, or both
  - b. Trace or tracking number
  - c. Received Date, Check Date, or EOB Deposit Date
  - d. A single date or date range
  - e. Patient
  - f. Insurance/Payer
5. Once you have selected, press the blue **Update** on the right of the screen, and the system will update your selections.