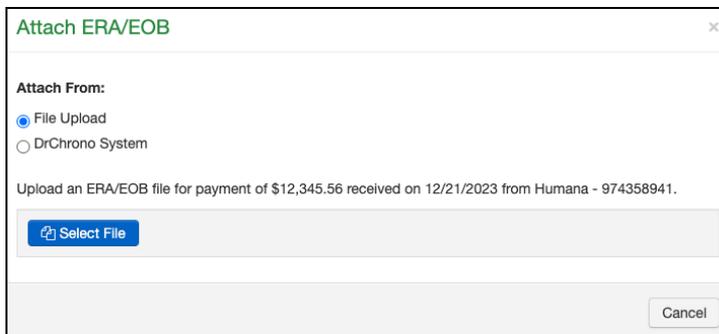


Insurance Credit Card Payments: How do I attach an ERA?

Last modified on 02/06/2025 2:37 pm EST

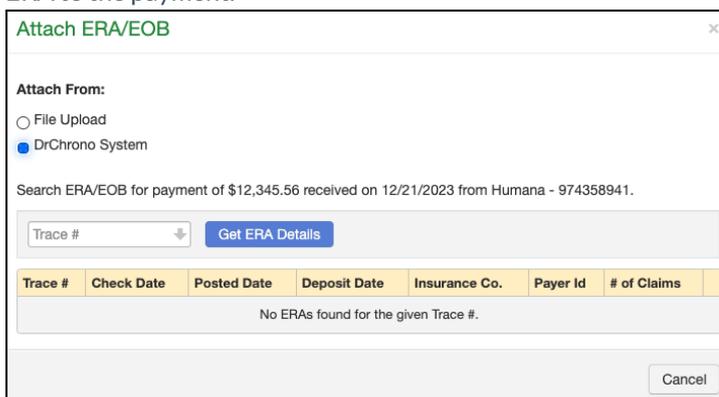
You can attach the ERA file or the scanned EOB to your DrChrono account for easy retrieval later.

1. Navigate to **Billing > Insurance Credit Card Payments**.
2. Press **+ Attach ERA/EOB**
3. There are two selections to retrieve the file to attach:
 - a. **File Upload** - If you've scanned the file to your computer, you can select File Upload to locate and attach the ERA/EOB.



The screenshot shows a dialog box titled "Attach ERA/EOB" with a close button (X) in the top right corner. Under the heading "Attach From:", there are two radio button options: "File Upload" (which is selected) and "DrChrono System". Below the options, there is a text prompt: "Upload an ERA/EOB file for payment of \$12,345.56 received on 12/21/2023 from Humana - 974358941." Below this text is a button labeled "Select File" with a file icon. At the bottom right of the dialog box is a "Cancel" button.

- b. **DrChrono System** - If the ERA file is already in the DrChrono system (under Remittance Reports), select that option and a window will open that will allow you to enter the Trace # that will attach the ERA to the payment.



The screenshot shows the same "Attach ERA/EOB" dialog box, but now "DrChrono System" is selected. Below the options, there is a text prompt: "Search ERA/EOB for payment of \$12,345.56 received on 12/21/2023 from Humana - 974358941." Below this text is a search field labeled "Trace #" with a dropdown arrow and a "Get ERA Details" button. Below the search field is a table with the following columns: "Trace #", "Check Date", "Posted Date", "Deposit Date", "Insurance Co.", "Payer Id", and "# of Claims". The table is currently empty and contains the text "No ERAs found for the given Trace #." at the bottom. At the bottom right of the dialog box is a "Cancel" button.

4. The entry can be edited, if needed, by pressing **Edit**.

Edit Payment ×

Insurance

Payment Amount

Identifier

**** Please note, that the insurance credit card screens will only work if you utilize DrChrono Payments as your credit card processor. ****
