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

Last modified on 06/05/2025 12:45 pm EDT

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.

Attach ERA/EOB	×
Attach From:	
File Upload	
O DrChrono System	
Upload an ERA/EOB file for payment of \$12,345.56 received on 12/21/2023 from Humana - 974358941.	
션] Select File	
Car	ncel

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.

Attach ERA/EOB							
Attach Fr	om:						
⊖ File Up	load						
DrChrono System							
Search ERA/EOB for payment of \$12,345.56 received on 12/21/2023 from Humana - 974358941.							
Trace # Get ERA Details							
Trace #	Check Date	Posted Date	Deposit Date	Insurance Co.	Payer Id	# of Claims	
No ERAs found for the given Trace #.							
						Cancel	

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

Edit Payment	×
Insurance	
Humana	
Payment Amount	Identifier
12345.56	974358941
	Cancel Pay with card

6

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