

# Archive an EOB/ERA

09/03/2024 5:28 pm EDT

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

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

**Billing** Account Marketplace

**BILLING**

- Billing Summary
- Live Claims Feed
- Patient Payments
- Day Sheet
- Transactions
- Remittance Reports**
- Unmatched ERAs
- Insurance Credit Card Payments
- Accounts Receivable
- Patient Statements
- Product/Procedure
- Patient Balance Ledger
- Fee Schedule
- Underpaid Items
- Adjustment Master
- Sales Tax
- 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.

Remittance Reports

ERA & EOB  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	
09/06/2016	09/06/2016		[EOB] 13462654	CBA Blue	0	Unmatched \$200.00	\$0.00	\$0.00	Check	<a href="#">Q View EOB</a> <a href="#">@ Update</a>
07/13/2016	07/13/2016		[EOB] 13245781	CBA Blue	0	Unmatched \$100.00	\$0.00	\$0.00	Automated Clearing House (ACH)	<a href="#">Q View EOB</a> <a href="#">@ Update</a>
07/12/2016	07/12/2016		[EOB] 324361097	Aetha	0	Unmatched \$200.00	\$0.00	\$0.00	Automated Clearing House (ACH)	<a href="#">Q View EOB</a> <a href="#">@ Update</a>
06/21/2016	06/21/2016		[EOB] 5432153	CIGNA	0	Unmatched \$200.00	\$0.00	\$0.00	Automated Clearing House (ACH)	<a href="#">Q View EOB</a> <a href="#">@ Update</a>
06/16/2016	06/16/2016		[EOB] 35736	Aetha	0	Unmatched \$200.00	\$0.00	\$0.00	Automated Clearing House (ACH)	<a href="#">Q View EOB</a> <a href="#">@ Update</a>
06/15/2016	06/15/2016		[EOB] 34573	Aetha KY	0	Unmatched \$200.00	\$0.00	\$0.00	Automated Clearing House (ACH)	<a href="#">Q View EOB</a> <a href="#">@ Update</a>
06/14/2016	06/14/2016		[EOB] 245676	AETNA PPO	0	Unmatched \$50.00	\$0.00	\$0.00	Automated Clearing House (ACH)	<a href="#">Q View EOB</a> <a href="#">@ Update</a>
06/10/2016	06/10/2016		[EOB] 9817534	Anthem Blue Cross	0	Unmatched \$200.00	\$0.00	\$0.00	Automated Clearing House (ACH)	<a href="#">Q View EOB</a> <a href="#">@ Update</a>
06/03/2016	06/03/2016		[EOB] 54238764	Aetha	0	Unmatched \$100.00	\$0.00	\$0.00	Automated Clearing House (ACH)	<a href="#">Q View EOB</a> <a href="#">@ Update</a>
05/17/2016	05/17/2016		[EOB] 986895	Aetha	0	Unmatched \$100.00	\$0.00	\$0.00	Automated Clearing House (ACH)	<a href="#">Q View EOB</a> <a href="#">@ Update</a>
05/15/2016	05/09/2016	05/17/2016	[EOB] 789654	Aetha	0	Unmatched \$1,000.00	\$0.00	\$0.00	Check	<a href="#">Q View EOB</a> <a href="#">@ Update</a>
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)	<a href="#">Q View EOB</a> <a href="#">@ Update</a>

Feedback Support ? ? ?

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

Schedule Clinical Patients Reports Billing Account Help Search

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
09/06/2016	09/06/2016		[EOB] 13462654	CBA Blue	0	Unmatched	\$200.00	\$0.00	Check
07/13/2016	07/13/2016		[EOB] 13245781	CBA Blue	0	Unmatched	\$100.00	\$0.00	Automated Clearing House (ACH)
07/12/2016	07/12/2016		[EOB] 324361097	Aetna	0	Unmatched	\$200.00	\$0.00	Automated Clearing House (ACH)
06/21/2016	06/21/2016		[EOB] 5432153	CIGNA	0	Unmatched	\$200.00	\$0.00	Automated Clearing House (ACH)
06/16/2016	06/16/2016		[EOB] 35736	Aetna	0	Unmatched	\$200.00	\$0.00	Automated Clearing House (ACH)
06/15/2016	06/15/2016		[EOB] 34573	Aetna KY	0	Unmatched	\$200.00	\$0.00	Automated Clearing House (ACH)
06/14/2016	06/14/2016		[EOB] 245676	AETNA PPO	0	Unmatched	\$50.00	\$0.00	Automated Clearing House (ACH)
06/10/2016	06/10/2016		[EOB] 9817534	Anthem Blue Cross	0	Unmatched	\$200.00	\$0.00	Automated Clearing House (ACH)
06/03/2016	06/03/2016		[EOB] 54238764	Aetna	0	Unmatched	\$100.00	\$0.00	Automated Clearing House (ACH)
05/17/2016	05/17/2016		[EOB] 989895	Aetna	0	Unmatched	\$100.00	\$0.00	Automated Clearing House (ACH)
05/15/2016	05/09/2016	05/17/2016	[EOB] 789854	Aetna	0	Unmatched	\$1,000.00	\$0.00	Check
05/09/2016	05/09/2016		[EOB] 47465	Blue Cross Blue Shield of	0	Unmatched	\$100.00	\$0.00	Automated Clearing House (ACH)

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
02/01/2016	02/01/2016		[EOB] 1234567	Aetna	0	Unmatched	\$1,000.00	\$0.00	Check

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	App	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.