

Archive an EOB/ERA

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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. Navigate to Billing > Remittance Reports
2. Enter the Trace # (EOB/ERA number) if available. Posted Date or the Insurance search functions can also be used to locate a voucher.

The screenshot shows the 'Remittance Reports' search interface. It includes a search bar with 'ERA & EOB' selected, and fields for 'Trace #', 'Posted Date', 'From', 'To', 'Patient', and 'Insurance'. Below the search bar are buttons for 'Export', 'Print', '+ Add EOB', '+ Add EOB Batch', and 'Upload ERA'.

3. Select the EOB/ERA number from the listing.

The screenshot shows the 'Remittance Reports' listing table. The table has columns: Check Date, Posted Date, Deposit Date, Check/Trace #, Insurance Co., # of Claims, Global Adj, Check /EFT Amount, and Payment Method. A red arrow points to the 'EOB' link next to the trace number 123456.

Check Date	Posted Date	Deposit Date	Check/Trace #	Insurance Co.	# of Claims	Global Adj	Check /EFT Amount	Payment Method	
02/13/2025	02/13/2025		EOB 123456	Aetna	1	\$0.00	\$0.00	Unknown	View EOB Update EOB

4. Select **Archive Transactions** from the **Action** menu.

The screenshot shows the 'ERA List' detail view for trace number 123456 from Aetna. It includes fields for Trace Number, Claim ID, Insurance Claim #, Payer Name, Payer ID, Total Paid, Check Date, Deposit Date, and Payment Method. Below the form is a table with columns: No., Patient, Appointment, Check Date, Office, Billed, Adjusted, Co-ins, Pt Resp, Paid, Note, and Status. A red arrow points to the 'Archive Transactions' option in the 'Action' menu.

No.	Patient	Appointment	Check Date	Office	Billed	Adjusted	Co-ins	Pt Resp	Paid	Note	Status
1		12/24/20	2/30/2024	Primary Office	\$12.95	\$0.00	\$0.00	\$0.00	\$0.00	CU2: Not separately reimbursable	View Print Transaction

5. The entire EOB/ERA is now archived and will not appear in the remittance report listing.

