

Archive an EOB/ERA

Last modified on 03/10/2025 11:42 am 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. 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 for '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 'Check/Trace #' column, which contains the value '123456'. Below the table are buttons for 'Export', 'Print', '+ Add EOB', '+ Add EOB Batch', and 'Upload ERA'. The page number '1 - 1 OF 1' is displayed at the bottom right.

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		123456	Aetna	1	\$0.00	\$0.00	Unknown

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 these fields are buttons for 'View EOB', 'Update EOB', and 'Update EOB'. The 'Action' menu is open, showing options: 'Print Transactions', 'Export to File', 'Read Source', 'Export Source', 'Archive Transactions', and 'Unarchived Transactions'. A red arrow points to the 'Archive Transactions' option. Below the menu is a table with columns for 'No.', 'Patient', 'Appointment', 'Check Date', 'Office', 'Billed', 'Adjusted', 'Co-Ins', 'Pt Resp', 'Paid', 'Note', and 'Status'. The table contains one row with the following data: 1, 12/24/2024, 12/24/2024, Primary Office, \$12.95, \$0.00, \$0.00, \$0.00, \$0.00, CU2: Not separately reimbursable.

No.	Patient	Appointment	Check Date	Office	Billed	Adjusted	Co-Ins	Pt Resp	Paid	Note	Status
1		12/24/2024	12/24/2024	Primary Office	\$12.95	\$0.00	\$0.00	\$0.00	\$0.00	CU2: Not separately reimbursable	

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

