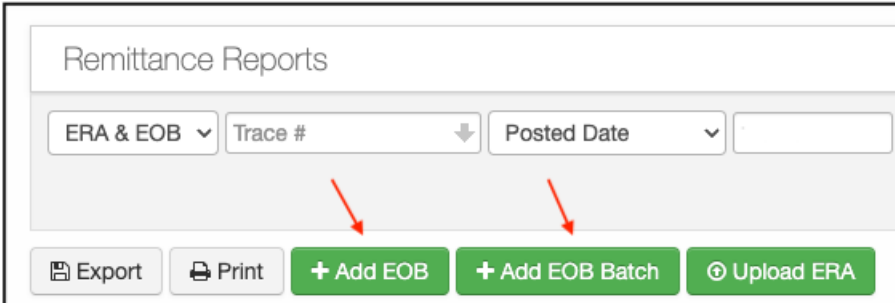


How Do I Add an Insurance EOB to my DrChrono account?

Last modified on 11/18/2024 3:22 pm EST

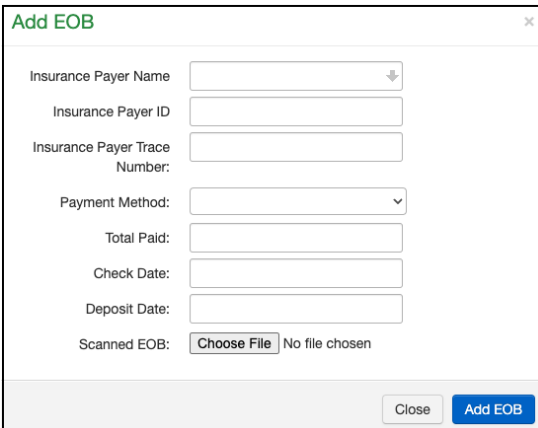
If you receive a paper explanation of benefits (EOB) from an insurance payer, the best practice is to scan the document, add it to your DrChrono account, and attach it to the patient's appointment(s) that are included on the EOB. The image will be available to answer any questions the office or the patient has about the claim adjudication. It can be viewed or printed as necessary.

1. Hover your cursor over the **Billing** tab and choose **Remittance Reports** from the drop-down menu.
2. Select the **Add EOB** or (**Add EOB Batch** if you have multiple to add) button:



The screenshot shows the 'Remittance Reports' interface. At the top, there is a search bar with the text 'Remittance Reports'. Below this, there are several input fields: 'ERA & EOB' (a dropdown menu), 'Trace #' (a text input field with a downward arrow), 'Posted Date' (a dropdown menu), and an empty text input field. At the bottom of the interface, there are five buttons: 'Export' (with a document icon), 'Print' (with a printer icon), '+ Add EOB' (highlighted with a red arrow), '+ Add EOB Batch' (highlighted with a red arrow), and 'Upload ERA' (with a circular arrow icon).

3. Enter the required information into the fields given:



The screenshot shows the 'Add EOB' form. The form has a title bar with 'Add EOB' and a close button. The fields are: 'Insurance Payer Name' (dropdown menu), 'Insurance Payer ID' (text input field), 'Insurance Payer Trace Number:' (text input field), 'Payment Method:' (dropdown menu), 'Total Paid:' (text input field), 'Check Date:' (text input field), 'Deposit Date:' (text input field), and 'Scanned EOB:' (a 'Choose File' button and the text 'No file chosen'). At the bottom of the form, there are two buttons: 'Close' and 'Add EOB'.

4. Enter the required information into the fields given:

Add EOB Batch ×

Batch Identifier

Total Paid \$0

Scanned EOBs: No file chosen +

Payer	Payer ID	Trace #	Payment Method	Amount Paid	Check Date

5. Once you have entered the required information, including uploading the scanned EOB image, select Add EOB or Add EOB Batch at the bottom right of the window.

6. When posting to individual patient accounts, enter the check # as the same number you entered as the Insurance Payer Trace Number when adding the EOB to the system. This will attach the image of the EOB to the payment within the patient's account.

☐	Code/Check Date	Description	Mods/Posted Date	Service Date 📅	Qty/Min	Dx Pointers	Price	Billed	Allowed
Totals:								\$175.00	\$175.00
☐	C 97110 ▼			From date <input type="text"/> To date <input type="text"/>	1.00	1 0 0 0	175.00	\$175.00	\$175.00
1	<input type="text"/>	<input type="text"/>		Check # <input type="text"/> ▼					Insurance Payme ▼
<input type="button" value="+ Add Line Item"/>		<input type="button" value="× Delete Selected"/>		↗					