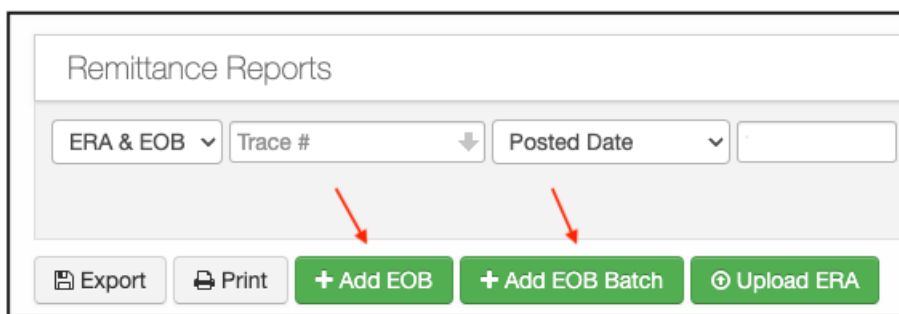


How Do I Add an Insurance EOB to my DrChrono account?

Last modified on 01/16/2026 2:48 pm EST

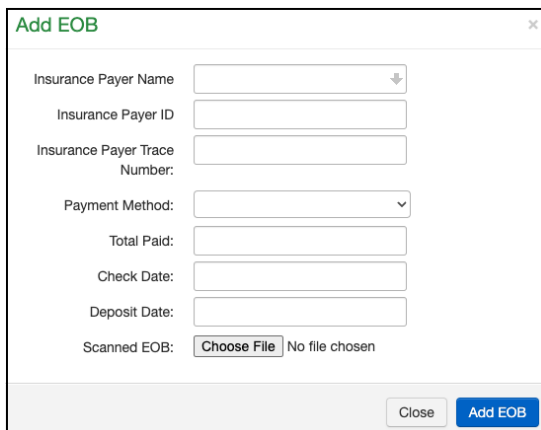
If you receive a paper explanation of benefits (EOB) from an insurance payer, the best practice is to scan the document, add it to your DrChrono account, and attach it to the patient's appointment(s) that are included on the EOB. The image will be available to answer any questions the office or the patient 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' section of the DrChrono interface. It includes a header 'Remittance Reports' and a search bar with fields for 'ERA & EOB', 'Trace #', and 'Posted Date'. Below the search bar, there are five buttons: 'Export', 'Print', '+ Add EOB', '+ Add EOB Batch', and 'Upload ERA'. Two red arrows point to the '+ Add EOB' and '+ Add EOB Batch' buttons.

3. Enter the required information into the fields given:



The screenshot shows the 'Add EOB' form. It contains the following fields: 'Insurance Payer Name' (dropdown), 'Insurance Payer ID' (text), 'Insurance Payer Trace Number' (text), 'Payment Method' (dropdown), 'Total Paid' (text), 'Check Date' (text), 'Deposit Date' (text), and 'Scanned EOB' (file upload). The 'Scanned EOB' field shows a 'Choose File' button and 'No file chosen'. At the bottom, there are 'Close' and 'Add EOB' buttons.

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

- 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.
- 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
<input type="checkbox"/>	C 97110			From date To date	1.00	1 0 0 0	175.00	\$175.00	\$175.00
<input type="checkbox"/>				Check #				Insurance Payme	
<input type="button" value="+ Add Line Item"/> <input type="button" value="x Delete Selected"/>									