



SOFTWARE SUPPORT 800-451-9723 ext. 1

EZ2000

Linking a Trojan plan to your Patient

1. Click on Patient-Insurance to add insurance coverage to a particular patient who has none.
2. Now click UPDATE button and hit the ENTER key until you get to the KEYINS field. Type the word TROJAN into the keyins field and hit the enter key.
3. It will take you to another screen where you can decide whether to use managed care plans or regular insurance plans.
4. The default is regular (indemnity) plans.
5. To switch to managed care plan you would click on TROJAN MANAGED CARE button on lower left.
6. Let us deal with benefit services for private indemnity plans as an example.
7. Type in the first few letters of the patient's employer if you like as in the example below where the letters CITI for Citibank are typed in.
8. Then the screen returns with many choices of employers that begin with CITI.
9. Once you have selected the appropriate plan it will return to the PATIENT INSURANCE SCREEN with all the necessary information (insurance company name, group number, etc.) It will ask if you want to replace the current employer with the one Trojan has on file. This is your choice.
10. Then continue by adding the person providing insurance as usual. Either the patient, his responsible party or a new party as shown below.
11. When you enter treatment for any patient who is tied into a Trojan plan, it will automatically calculate deductible, break down the percentage between patient and insurance portion due and show it on the invoice, and max out when it hits the patient maximum as set by Trojan Benefits Service.
12. Managed care is very similar although the reports generated by Trojan are more specific for the particular managed care showing possible fee schedules, co-pays, etc.