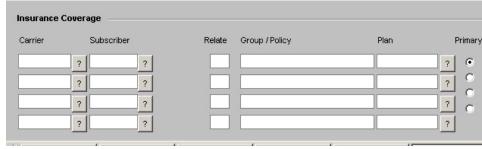# TROJAN PROFESSIONAL SERVICES
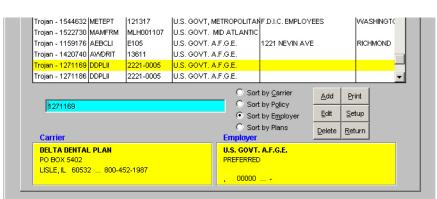
SOFTWARE SUPPORT 800-451-9723 ext. 1

Genesis Trojan Database
Linking a Trojan plan to your Patient

1. From the Patient File, refer to Insurance coverage section.

2. In the Plan field click on the question mark (?)

3. Insurance Benefits search screen will appear.
4. Choose to sort by Carrier, Policy or Employer
5. Or, simply type the Trojan Plan number and press Enter
6. Type in employer or policy number and press Enter
7. When you locate the desired plan, double click on it.
8. Select Yes to accept this plan.
9. Select Yes to update benefits.
10. Carrier, policy/group number and plan number fields should now
11. be filled in.