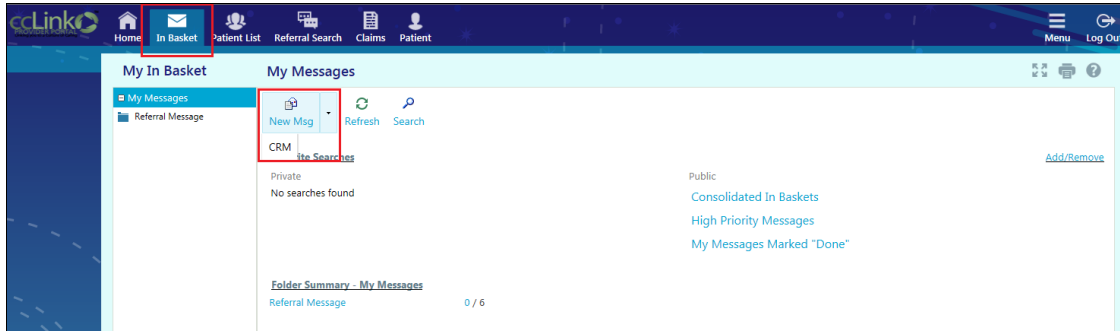**How to send a CRM (Customer Relationship Management) message via the In Basket to the CCHP Provider Relations Department**:

1. Click the **In Basket** button on the toolbar.
2. Click on down arrow next to the **New Msg** Button, and choose **CRM** from the drop down list.
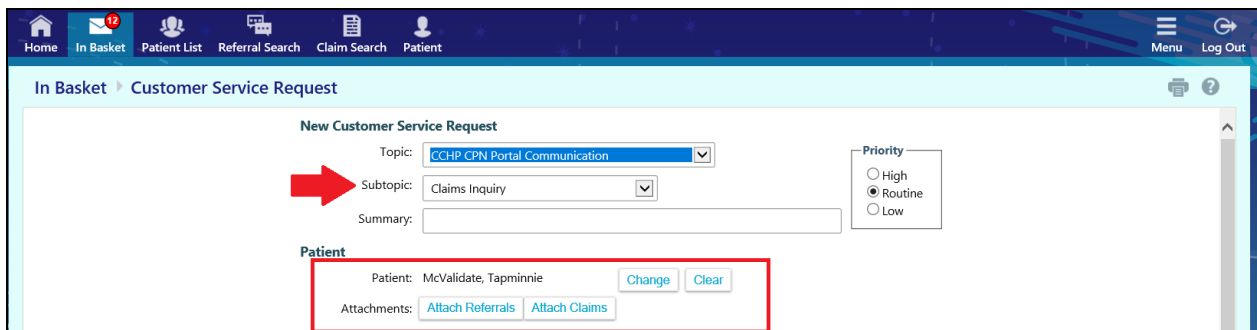

3. Once the CRM form is opened, choose the appropriate topic.
   - CCHP CPN Users will choose the topic: *CCHP CPN Portal Communication*
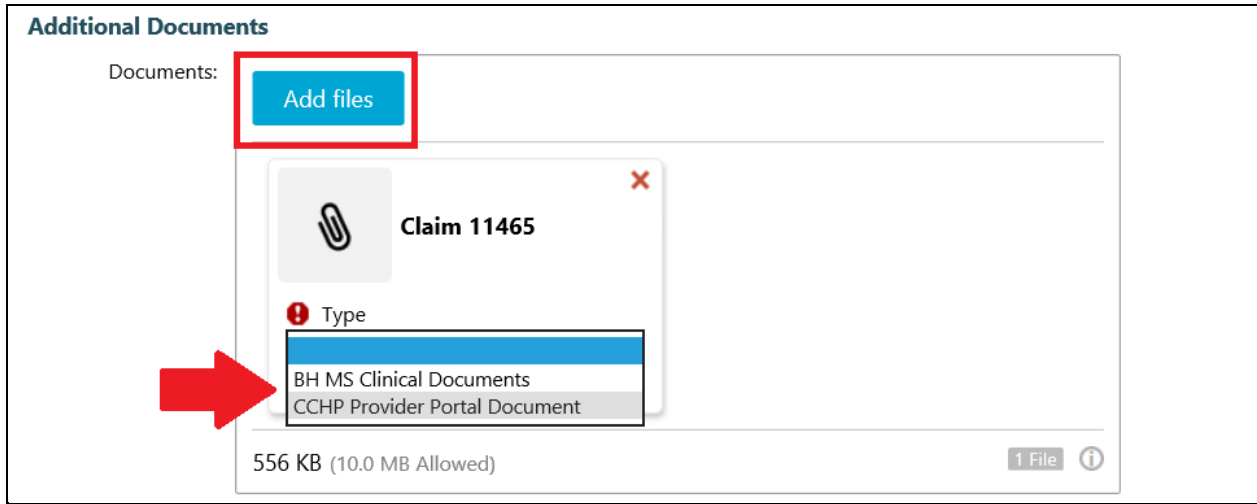   - Behavioral Health users will choose the topic: *Behavioral Health Communication*.

Note: see Tip Sheet #11 for topic: CCHP CPN: *Other Health Coverage Questionnaire* if needed.
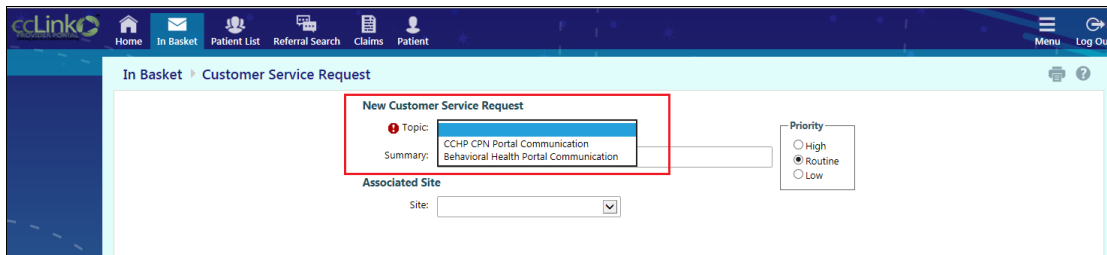
4. Select the appropriate Subtopic, Patient and fill in all required (red exclamation points) fields. After selecting the patient record, you can attach related referral or claim records:

5. To attach a file, click the Add Files button and select the document type for CCHP or BH.

Additional Documents

Documents:

Add files

📎 Claim 11465

❗ Type

BH MS Clinical Documents
CCHP Provider Portal Document

556 KB (10.0 MB Allowed)   1 File ⓘ

6. Click the Submit button.

✔ Submit   ✘ Cancel

Note: You can see your sent CRM messages in My Out Basket.

My In Basket

My Out Basket