

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.

| ccLinkO      | Home In Basket                   | Patient List Referral Search         | Claims Patient       | *   | p i o | *                      | • • 1 <sup>*</sup> | Menu Log Out      |
|--------------|----------------------------------|--------------------------------------|----------------------|-----|-------|------------------------|--------------------|-------------------|
|              | My In Basket                     | My Messages                          | ;                    |     |       |                        |                    | 53 <b>= 0</b>     |
|              | My Messages     Referral Message | New Msg · Re<br>CRM                  | C P<br>efresh Search |     |       |                        |                    | <u>Add/Remove</u> |
|              |                                  | Private                              |                      |     |       | Public                 |                    |                   |
|              |                                  | No searches tound                    |                      |     |       | Consolidated In Basket | S                  |                   |
|              |                                  |                                      |                      |     |       | High Priority Messages |                    |                   |
| <u>``</u> `, |                                  |                                      |                      |     |       | My Messages Marked "   | 'Done"             |                   |
|              |                                  | Folder Summary -<br>Referral Message | - My Messages        | 0/6 |       |                        |                    |                   |

- 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.

| ccLinkO | n<br>Home | Masket                       | Patient List | Referral Search | Claims     | L<br>Patient | •                | P              | i<br>I   | * | •               | • | 1 <sup></sup> | E<br>Menu | ⊖<br>Log Out |
|---------|-----------|------------------------------|--------------|-----------------|------------|--------------|------------------|----------------|----------|---|-----------------|---|---------------|-----------|--------------|
|         | In B      | asket 🕨                      | Customer     | Service Requ    | uest       |              |                  |                |          |   |                 |   |               | Ē         | 0            |
|         |           | New Customer Service Request |              |                 |            |              |                  |                |          |   |                 |   |               |           |              |
|         |           |                              |              |                 | S<br>Assoc | ummary:      | Behavioral Healt | h Portal Commu | nication |   | Routine     Low |   |               |           |              |
|         |           |                              |              |                 |            | Site:        |                  |                | ~        |   |                 |   |               |           |              |
|         |           |                              |              |                 |            |              |                  |                |          |   |                 |   |               |           |              |

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:

| Home  | In Basket Patient List | Referral Search | Claim Search P                                  | L *   | P   P →<br>I | *     | l<br>I                                   | Menu | C<br>Log Out |
|-------|------------------------|-----------------|---|---|--------------|-------|--|------|--------------|
| In Ba | asket 🕨 Custome        | r Service Req   | uest  |   |              |       |  | (    | 0            |
|       |                        | 1               | lew Customer Se<br>Topic<br>Subtopic<br>Summary | rvice Request CCHP CPN Portal Commun Claims Inquiry | ication      |       | Priority<br>○ High<br>● Routine<br>○ Low |      | ^            |
|       |                        | F               | Patient<br>Patient<br>Attachments               | McValidate, Tapminnie                               | Change       | Clear |  |      |              |

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

| Additional Docume | nts                     |  |           |  |
|-------------------|-------------------------|--|-----------|--|
| Documents:        | Add files               |  |           |  |
|                   |                         | ×  |           |  |
|                   | Ø                       | Claim 11465                              |           |  |
|                   | \rm В Туре              |  |           |  |
|                   | BH MS Clir<br>CCHP Prov | nical Documents<br>vider Portal Document |           |  |
|                   | 556 KB (10.0 M          | //B Allowed)                             | 1 File () |  |

6. Click the Submit button.

| <br>   |          |
|--------|----------|
| Submit | × Cancel |
|        | 1        |

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

