

VHP Access QSG - Create CRMs

Customer Relationship Management (CRM), is used to communicate with VHP for questions, requests, complaints, or compliments.

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Create a CRM Ad Hoc

1. Click **Patient** from your home screen or on the toolbar.
2. Click the **Claim by Member** or **Referral by Member** tab.




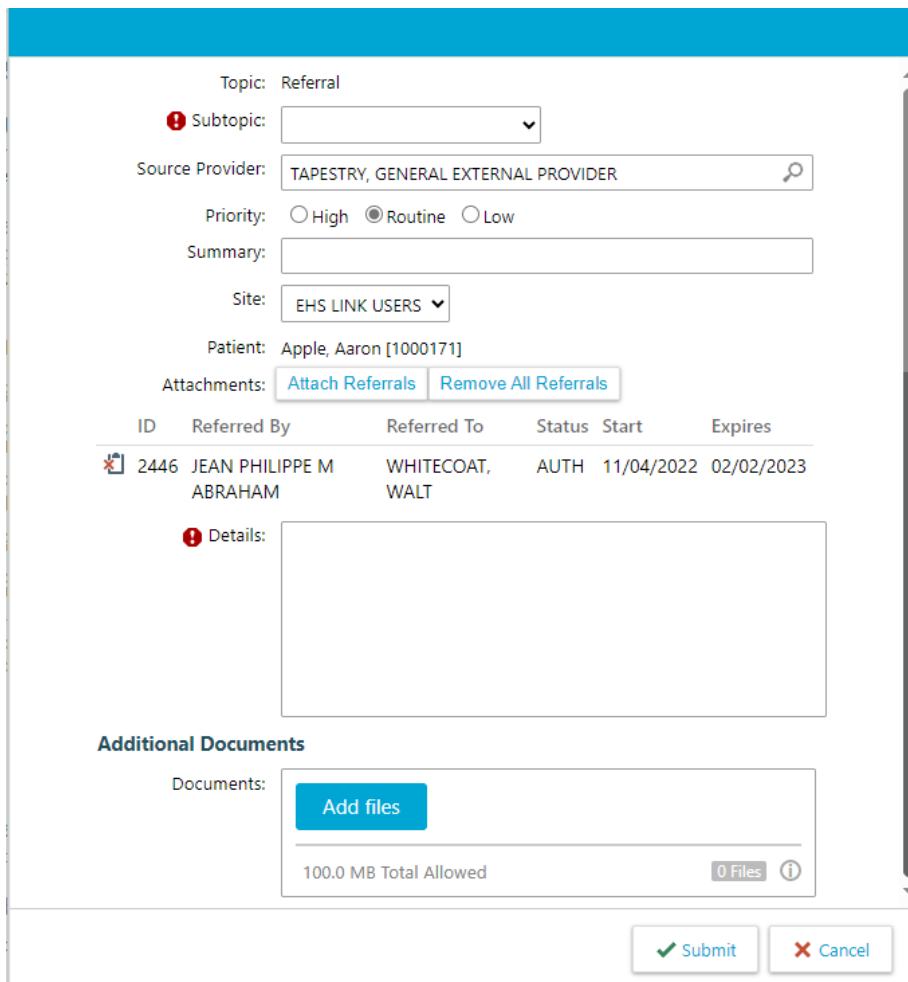
Depending on your configuration, you can also create CRMs from other activities such as **Demographics, Claim Search, Referral Search, Benefits Summary,** and the **Coverage Detail Report.**

3. Enter your member in the **Name or MRN** field and click **Search**.
4. Double click on your member from the search results.
5. Hover over the **Ask A Question** icon on the right.
6. Click the black **Claims Question** or **Referrals Question** bubble that appears.

Claim #	Svc Frm Dt	Clm Rcv Dt	Status
3730	10/23/2022	10/23/2022	Processing

ID	Payor	Referred By	Referred To	Status	Start Date	Expiration Date	Creation Date
3982	VALLEY HEALTH PLAN	TAPESTRY, GENERAL EXTERNAL PROVIDER	WILLIAM HAMILTON	PEND	12/22/2022	03/22/2023	12/22/2022
2498	VALLEY HEALTH PLAN	WHITECOAT, WALT	STANFORD HEALTH CARE	AUTH	11/21/2022	02/20/2023	11/22/2022

7. Fill out the fields in the window.
 - a. Subtopic: Select appropriate subtopic from the drop-down list
 - b. Source Provider: This automatically populates with your name, but you can change this if needed
 - c. Priority: Select High, Routine, or Low.
 - d. Summary: Type a Summary of your Inquiry
 - e. Site: If you are associated to multiple sites then you would need to select the correct one
 - f. Attachments: Claim or Referral is already attached but you can remove if you want
 - g. Details: Enter your question or request in the free-text field.
 - h. Documents: Required to Attach additional files
8. Click  **Submit**.
9. You can view your submitted CRMs by clicking **CRM** in the toolbar and entering your name in the **Provider** field.



Topic: Referral

Subtopic:

Source Provider: TAPESTRY, GENERAL EXTERNAL PROVIDER

Priority: High Routine Low

Summary:

Site: EHS LINK USERS

Patient: Apple, Aaron [1000171]

Attachments: [Attach Referrals](#) [Remove All Referrals](#)

ID	Referred By	Referred To	Status	Start	Expires
2446	JEAN PHILIPPE M ABRAHAM	WHITECOAT, WALT	AUTH	11/04/2022	02/02/2023

Details:

Additional Documents

Documents: [Add files](#)

100.0 MB Total Allowed 0 Files

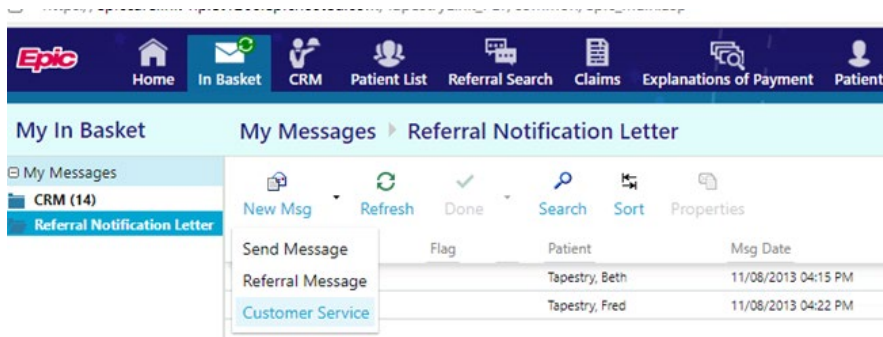
[Submit](#) [Cancel](#)



Additionally from the **CRM** activity, you can see requests for information on the **Request for Information** tab.

Create a CRM in In Basket

1. Click the **In Basket** from your home screen or from the toolbar.
2. Click the drop-down arrow next to the **New Msg** button.
3. Click **Customer Service**.



4. Fill out the fields.
 - a. Topic: Enter a topic of your choice
 - b. Subtopic: Some topics will require a subtopic to be selected
 - c. Source Provider: This will default in your name but you can change this
 - d. Priority: Select High, Routine, or Low.
 - e. Summary: Enter a summary of the CRM.
 - f. Site: Select appropriate site if you are associated with more than one
 - g. Patient: Select a member record if applicable
 - h. Attachments: Attach a file such as a claim or a referral.
 - i. Details: Enter your question or request in the free-text field.
 - j. Documents: Attach additional files if necessary.
5. Click **Submit**.

Follow up on a CRM

1. View your submitted CRMs or CRMs for others from your organization by selecting **CRM** in the toolbar.
2. Click **Submitted CRM**.
3. Enter the name of the person that submitted the CRM in the Provider field and you will be able to see all the unresolved CRMs and Resolved CRMs in the last 60 days for that Provider.

The screenshot shows the 'Submitted CRMs' page in the VHP system. The top navigation bar includes 'VHP Access', 'Home', 'In Bas...', 'CRM', 'Patien...', 'Referr...', 'Claims', 'Explan...', 'Patient', 'Menu', 'Log Out', and the 'Epic' logo. Below the navigation bar, there are tabs for 'Request For Information' and 'Submitted CRM'. The main content area is titled 'Submitted CRMs' and features a search bar for the 'Provider' field, which contains the text 'TAPESTRY, LAUREN PROVIDER'. Below the search bar, there are two sections: 'Unresolved CRMs' and 'Resolved CRMs in the Last 60 Days'. The 'Unresolved CRMs' section contains a table with the following data:

Created On	Source	Subject	Topic
12/21/2023	Lauren Provider Tapestry, MD (Provider)	3730 (AP Claim)	General Claims Inquiry (Non-Dispute)

The 'Resolved CRMs in the Last 60 Days' section shows 'None'.

4. Select on the CRM you want to view from the list.

The screenshot shows the details page for CRM # 248 in the VHP system. The top navigation bar is the same as in the previous screenshot. Below the navigation bar, there are tabs for 'Request For Information' and 'Submitted CRM'. The main content area is titled 'Submitted CRMs' and features a sub-tab for 'Customer Service Request Report'. The CRM details are as follows:

CRM # 248 (highlighted in a red box)

Priority: Routine Created on: 12/21/2023 10:20 AM By: Lauren Provider Tapestry, MD
Owner: None
Status: **Unresolved**

Attachments

File	User	Attached
Medical Necessity.pdf Type: AP Claim Attachment	Lauren Provider Tapestry, MD	12/21/2023 10:20 AM

Additional Documents

AP Claim Attachment - Document on 12/21/2023 10:20 AM: Medical Necessity.pdf

Primary Information

Source	Subject	Topic
Lauren Provider Tapestry, MD (Provider)	3730 (AP Claim)	General Claims Inquiry (Non-Dispute)

Summary: Claims Question
Testing ask a claims question.
----- Questionnaire: General Claims Inquiry -----
NOTICE: DO NOT USE THIS TOPIC TO SUBMIT A PROVIDER DISPUTE
I ACKNOWLEDGE
Please enter your first and last name:
Ann
What is the claim number?
Ybarro
What is the date of service?
10/23/2022
What is the billed amount on the claim?
100.00
What is the member's ID?

At the bottom of the page, there is a 'Back' button and a footer that reads: 'Logged in as: TAPESTRY, GENERAL EXTERNAL Healthy Planet® Link, EpicCare® Link, and Tapestry® Link licensed from Epic Systems Corporation. © 1979-2022 Epic Systems Corporation. TRAINING PLAYGROUND'.

5. **Contact** Provider Operations by calling the VHP main number at (888) 421-8444, select a language option, then select option 2 (if you are a Provider) then option 7 (Provider Relations/Operations). Let them know the CRM# you would like to follow up on.
6. You can also send an email to providerrelations@vhp.sccgov.org with the CRM# that you would like to follow up on.

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