VHP Access QSG - Create CRMs

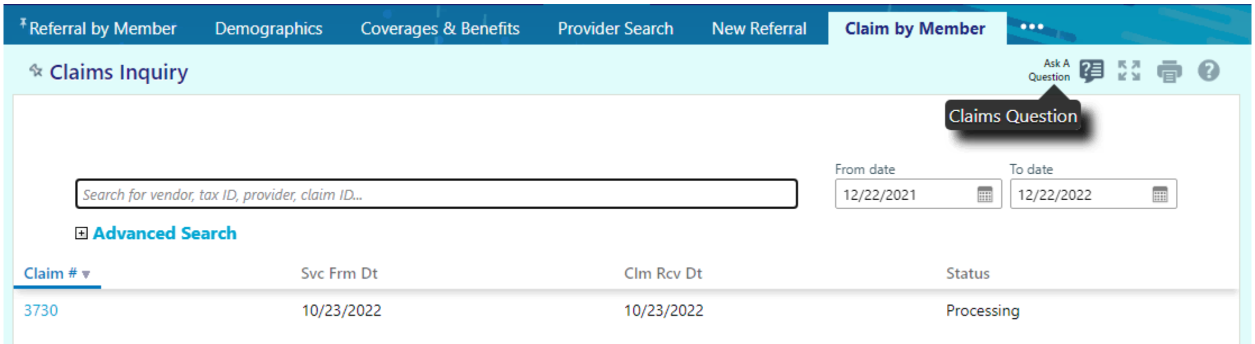
Customer Relationship Management (CRM), is used to communicate with VHP for questions, requests, complaints, or compliments.

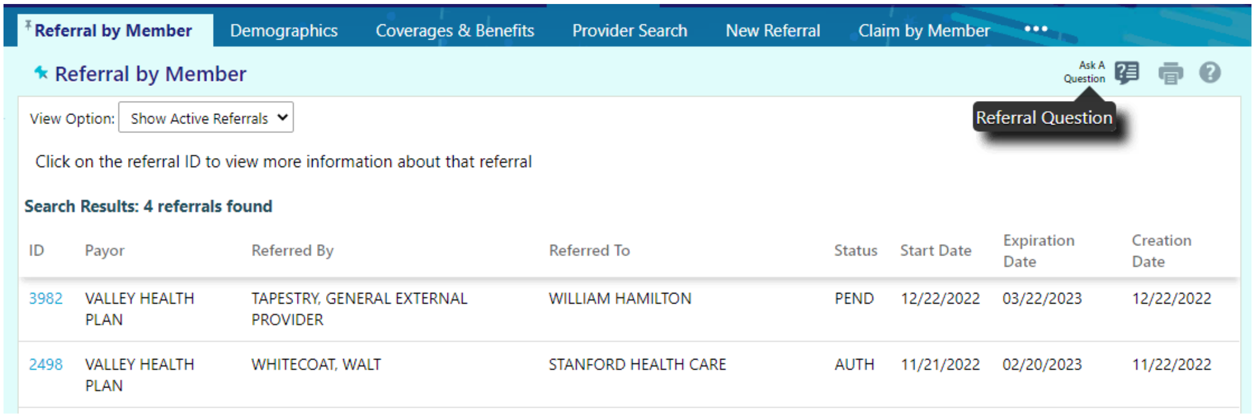
Create a CRM Ad Hoc

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 **Demographics**, **Claim Search**, **Referral Search**, **Benefits Summary**, and the **Coverage Detail Report**.

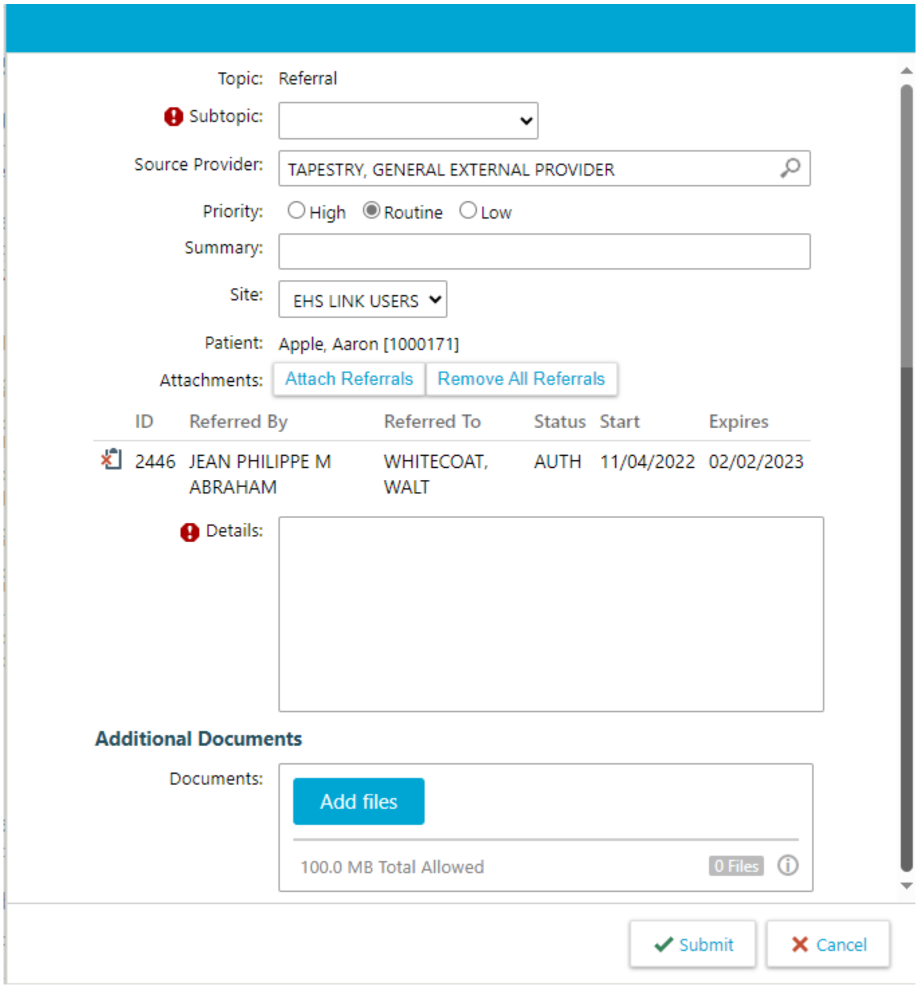
3. Enter your member in the **Name or MRN** field and click **Search**.
4. Double click on your member from the search results.
5. Hover over the **Ask A Question** icon on the right.
6. Click the black **Claims Question** or **Referrals Question** bubble that appears.





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.



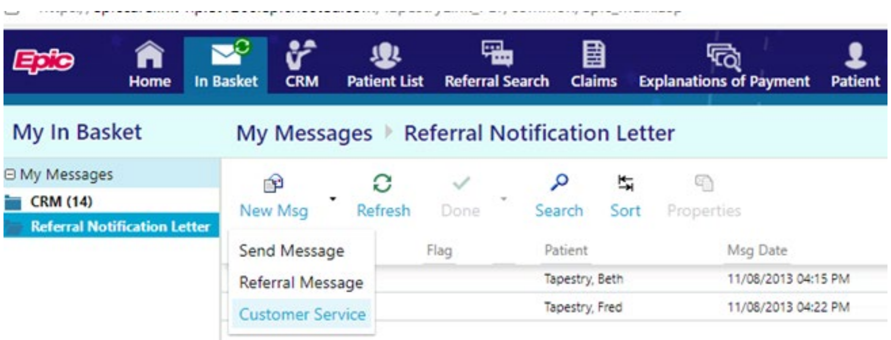
Additionally from the **CRM** activity, you can see requests for information on the **Request for Information** tab.

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**.

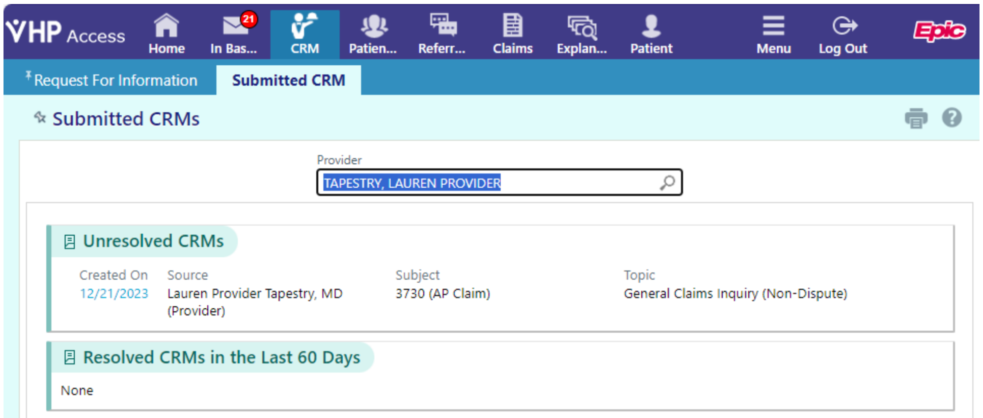


4. Fill out the fields.
   a. Topic: Enter a topic of your choice
   b. Subtopic: Some topics will require a subtopic to be selected
   c. Source Provider: This will default in your name but you can change this
   d. Priority: Select High, Routine, or Low.
   e. Summary: Enter a summary of the CRM.
   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.

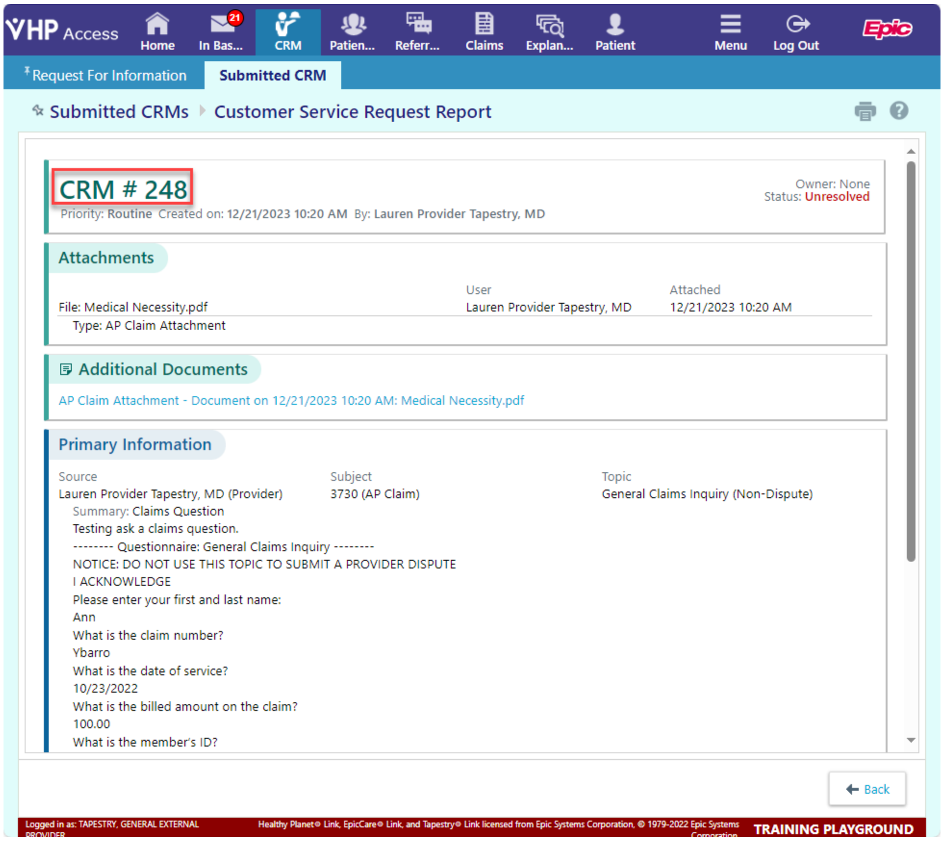
5. Click ✔ **Submit**.

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.



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



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.