

HCPF Escalations

Partner Integration - Cohort #1

Part 3 Meeting
10/30/2025

What Should Be Completed in Bright

- Part 3 Module - Communications
 - External Communications
 - Internal Communications
 - Salesforce Sign-In & MFA
- Review & download all resources included in this section!

Escalations: External Communications

Escalations: External Communications

- In the Escalations: External Communications module, you reviewed how to communicate with external parties on tickets via email. This included the following:
 - How to Send an Email from a Ticket
 - Attaching Files to Outgoing Emails from Salesforce
 - Using Email Templates
 - Previewing Emails
 - Clearing Emails
 - Popout to Docked View
 - How to send an encrypted email from Salesforce
- We will briefly cover these concepts together, as well as review some best practices in Salesforce!

How to Send an Email from a Ticket

Salesforce users have the option of sending email correspondence to non-Salesforce users. Users can send an email from a ticket by doing the following:

1. Navigate to the Email tab.
2. Select the appropriate shared inbox to send your email from.
3. Ensure that the correct recipients are listed in the “To” field.
4. Check your subject line for encryption and Thread ID.
5. Type out your message in the body section of the email, or utilize a Salesforce template.
6. Attach any necessary attachments to the email.
7. Click the blue Send button.
8. Ensure email was properly sent from Salesforce in Related/Chatter Tabs.

Creating & Sending an Email

Email

New TaskPostTicket CommentClose Ticket

From

HCPF County - Member Complaints <hcpf_county_membercomplaints@state.co.us>

To

angela.eiler@state.co.us X

Subject

RE: ENCRYPT RE: Member Complaint TEST [thread::xsSQ4HmdfSmRHETbby5iaj0::]

I_xA- A-

B I U S

<>

Font

Size

Format

----- Original Message -----

From: HCPF_CountyMemberComplaints [hcpf_membercomplaints@state.co.us]

Sent: 10/9/2023 10:46 AM

To: angela.eiler@state.co.us

Subject: ENCRYPT RE: Member Complaint TEST [thread::xsSQ4HmdfSmRHETbby5iaj0::]

Testing Encryption

----- Original Message -----

From: HCPF_CountyMemberComplaints [hcpf_membercomplaints@state.co.us]

Send

Confirming the Email was Sent

 Ticket
03235069

 Email was sent.

[Follow](#) [Create MCC Dental Ticket](#) [Edit](#) [Change Owner](#) [View Ticket Hierarchy](#)

Case Number

State ID_From Citizen

Status
Closed

Ticket Type
INTERNAL USE ONLY - Invalid Request

Date/Time Opened
8/25/2023 1:17 PM

***** FLAG ON CASE NUMBER ***** READ NOTICE ON CASE Number *****

Related

Details

Chatter

Activity

Most Recent Activity ▾

All Updates

Emails

Private Answers

Call Logs

Text Posts

Status Changes

 **Angela Eiler**

To: angela.eiler, Bcc: angela.eiler ⓘ

Just now ▾

Testing Encryption.

----- Original Message -----

From: HCPF_CountyMemberComplaints [hcpf_membercomplaints@state.co.us]
Sent: 10/9/2023 10:46 AM
To: angela.eiler@state.co.us
Subject: ENCRYPT RE: Member Complaint TEST []

Testing Encryption

Related

Details

Chatter

Activity

 **Emails (5)**

5 items • Sorted by Message Date • Updated 2 minutes ago

	Subject	From Address	To Address
1	RE: ENCRYPT RE: Member Complaint TEST [thread:xs...	hcpf_county_membercomplaints@state.co...	angela.eiler@state.co.us
2	ENCRYPT RE: Member Complaint TEST [thread:xsSQ4...	hcpf_membercomplaints@state.co.us	angela.eiler@state.co.us
3	RE: Member Complaint TEST [thread:xsSQ4HmdfSmR...	hcpf_membercomplaints@state.co.us	angela.eiler@state.co.us
4	RE: Member Complaint TEST [thread:xsSQ4HmdfSmR...	hcpf_membercomplaints@state.co.us	angela.eiler@state.co.us
5	Member Complaint TEST	angela.eiler@state.co.us	hcpf_membercomplaints@state.co.us

[View All](#)

Attaching Files to Outgoing Emails from Salesforce

Salesforce users have the option of attaching files to outgoing email correspondence with non-Salesforce users. They can attach a file by doing the following:

1. Select the “paperclip” icon.
2. Select the correct file location.
3. Ensure the file was successfully attached to the email.
4. Click the blue Send button.
5. Ensure email was properly sent from Salesforce in Related/Chatter Tabs.

Creating & Sending an Email with an Attachment

Email New Task Post Ticket Comment Close Ticket

From: HCPF County - Member Complaints <hcpf_county_membercomplaints@state.co.us>

To: angela.eiler@state.co.us X

Subject: RE: ENCRYPT RE: Member Complaint TEST [thread::xsSQ4HmdfSmRHEtby5iaj0::]

I **A** **A** **B** **I** **U** **S** Font Size Format

TEST

----- Original Message -----
From: HCPF County - Member Complaints [hcpf_county_membercomplaints@state.co.us]
Sent: 9/20/2025 3:39 PM
To: angela.eiler@state.co.us
Subject: RE: ENCRYPT RE: Member Complaint TEST [thread::xsSQ4HmdfSmRHEtby5iaj0::]

Testing Encryption.

----- Original Message -----

download X

Send

Confirming the Email & Attachment were Sent

Ticket 03235069

Case Number: State ID_From Citizen: Status: Closed Ticket Type: INTERNAL USE ONLY - Invalid Request Date/Time Opened: 8/25/2023 1:17 PM

***** FLAG ON CASE NUMBER ***** READ NOTICE ON CASE Number *****

Related Details Chatter Activity

Emails (6)
6 items • Sorted by Message Date • Updated 5 minutes ago

	Subject	From Address	To Address
1	RE: ENCRYPT RE: Member Complaint TEST [thread:xs...	hcpf_county_membercomplaints@state.co...	angela.eiler@state.co.us
2	RE: ENCRYPT RE: Member Complaint TEST [thread:xs...	hcpf_county_membercomplaints@state.co...	angela.eiler@state.co.us
3	ENCRYPT RE: Member Complaint TEST [thread:xsSQ4...	hcpf_membercomplaints@state.co.us	angela.eiler@state.co.us
4	RE: Member Complaint TEST [thread:xsSQ4HmdfSmR...	hcpf_membercomplaints@state.co.us	angela.eiler@state.co.us
5	RE: Member Complaint TEST [thread:xsSQ4HmdfSmR...	hcpf_membercomplaints@state.co.us	angela.eiler@state.co.us
6	Member Complaint TEST	angela.eiler@state.co.us	hcpf_membercomplaints@state.co.us

Google Docs & Attachments (2)

download	download
Oct 11, 2023 • 11KB • png	Oct 4, 2023 • 11KB • png

Chatter

Most Recent Activity

All Updates Emails Private Answers Call Logs Text Posts Status Changes

Angela Eiler
To: angela.eiler, Bcc: angela.eiler

TEST

Expand Email

download.png

Reply Reply All Forward Comment

Using Email Templates

Salesforce users have the option of utilizing email templates for email correspondence with non-Salesforce users. User can use email templates by doing the following:

1. Select the “paper icon with a plus” icon.
2. Select a recently used email template or open the full template list.
3. Select an email template to automatically import into the body of your email.
4. Ensure a Thread ID is listed in the body & subject line of the email.

Using Email Templates

Email

New Task Post Ticket Comment Close Ticket

From HCPF County - Member Complaints <hcpf_county_membercomplaints@state.co.us>

To angela.eiler@state.co.us X

Subject Encrypt HCPF County Relations Ticket 03235069: Member Complaint TEST | Thread:thread::xsSQ4HmdfSmRHEtby5iaj0::

Formatting toolbar: I_x A₋ A₊ B I U S Table Image Link Unlink Bold Italic Underline Strikethrough Bulleted List Numbered List Indent Left Indent Right Font Size Format

Hello,

We are reaching out to inform you that your escalation ticket for Jon Snow has been successfully resolved.

We have worked with (County or Eligibility Site) and they informed us that the issue was resolved. Here are the details on the resolution:

Called member back. Provided guidance on how to submit renewal on PEAK. Member had no further questions. Marking as successfully resolved.

If you need anything further please respond to this email.

Thank you.

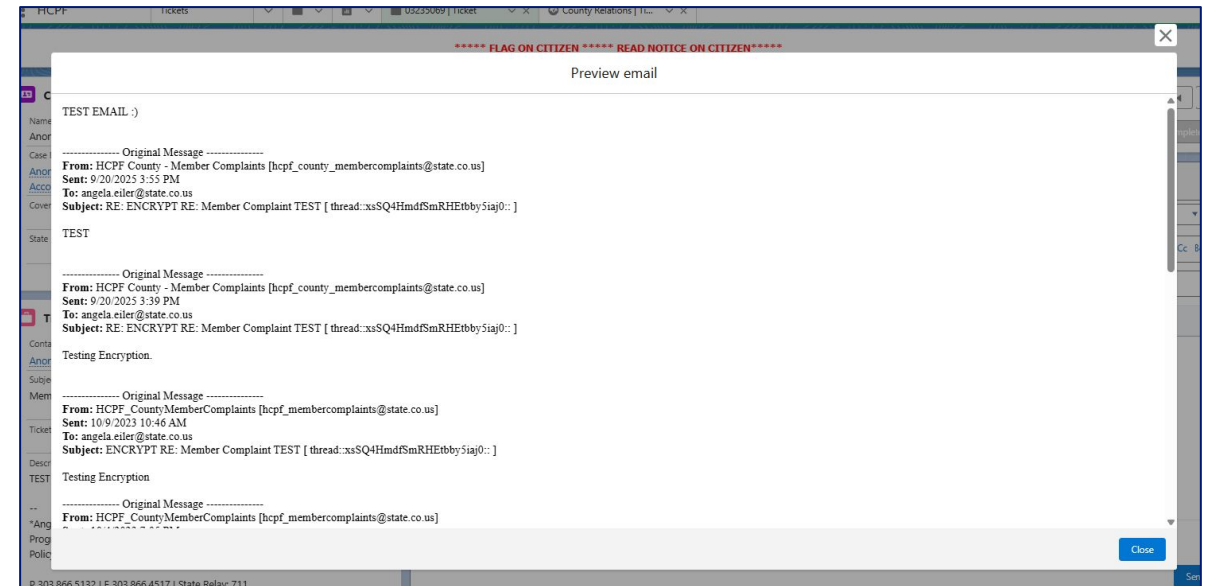
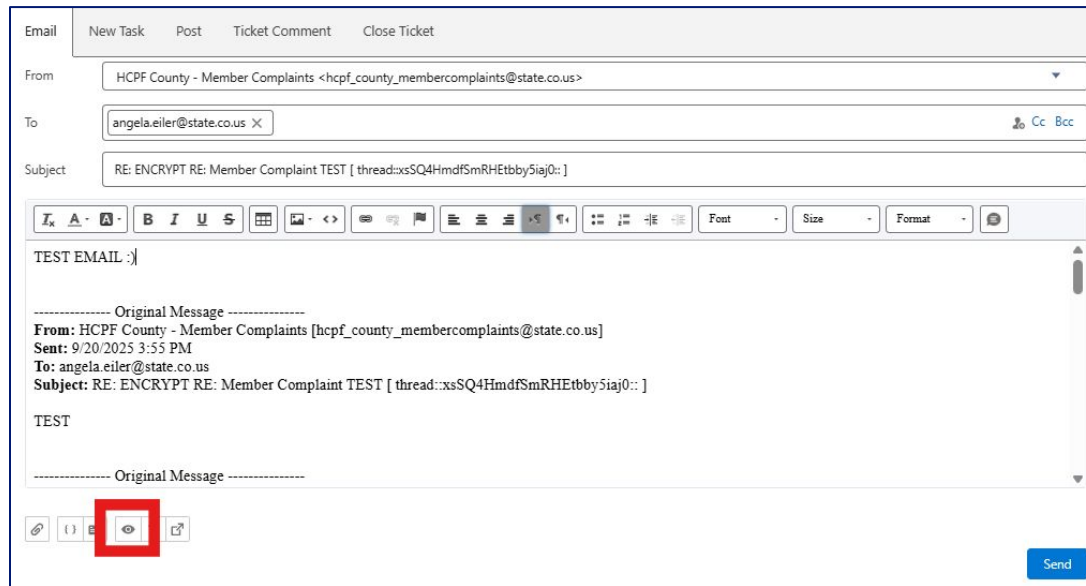
Attachment icon highlighted

Send

Previewing Emails

Salesforce users have the option to preview their email before sending it out to internal/external contacts. Users can preview their emails by doing the following:

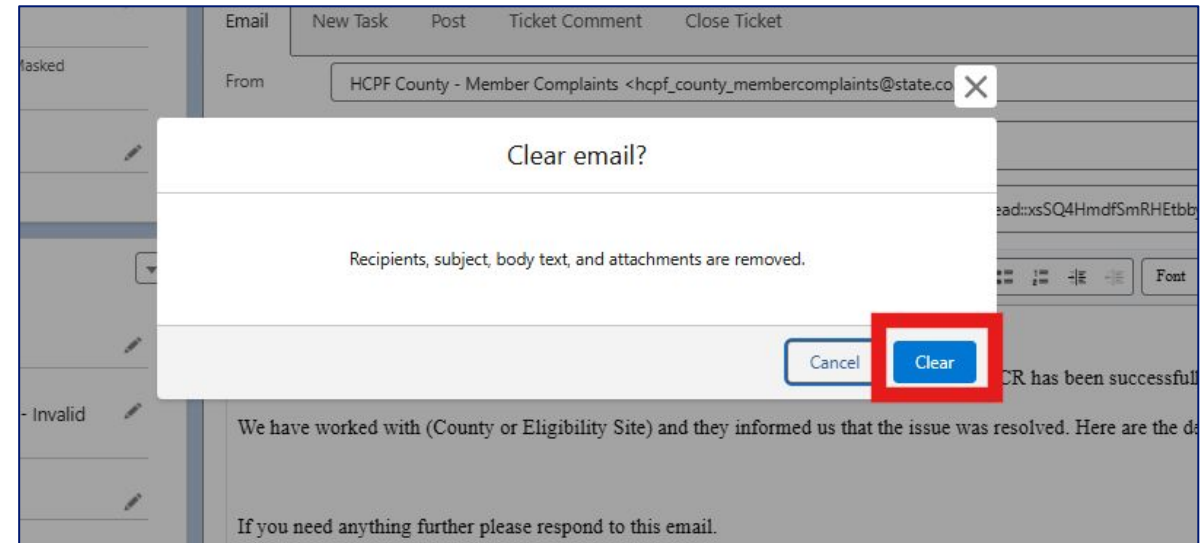
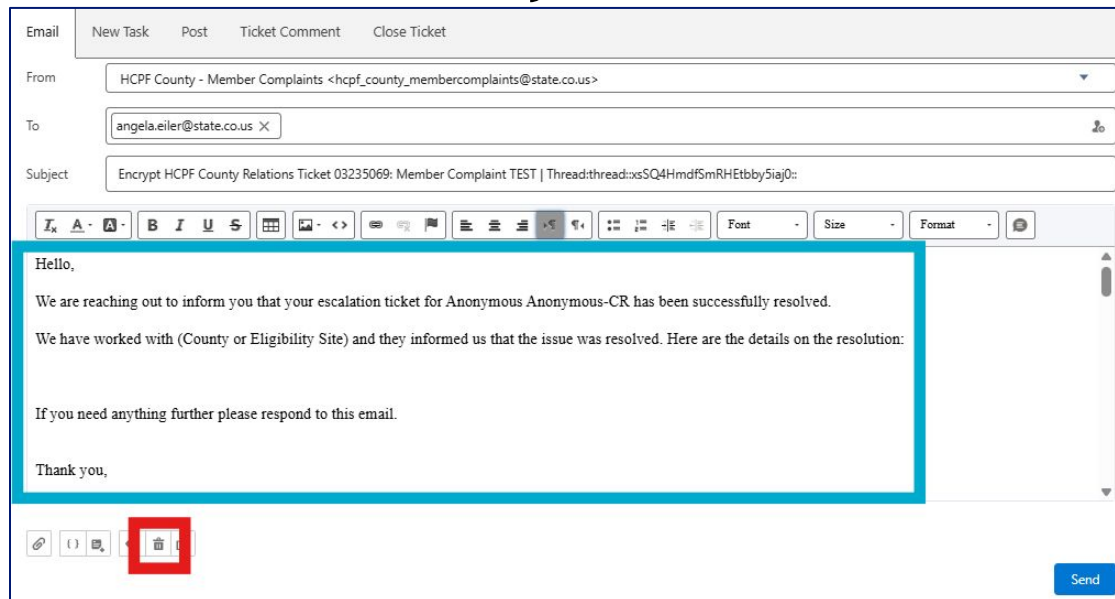
1. Navigate to the “eyeball” icon.
2. Review email in the “Preview Email” screen.



Clearing Emails

Salesforce users have the option to clear out the changes they've made to their email to begin drafting it again. Users can clear emails by doing the following:

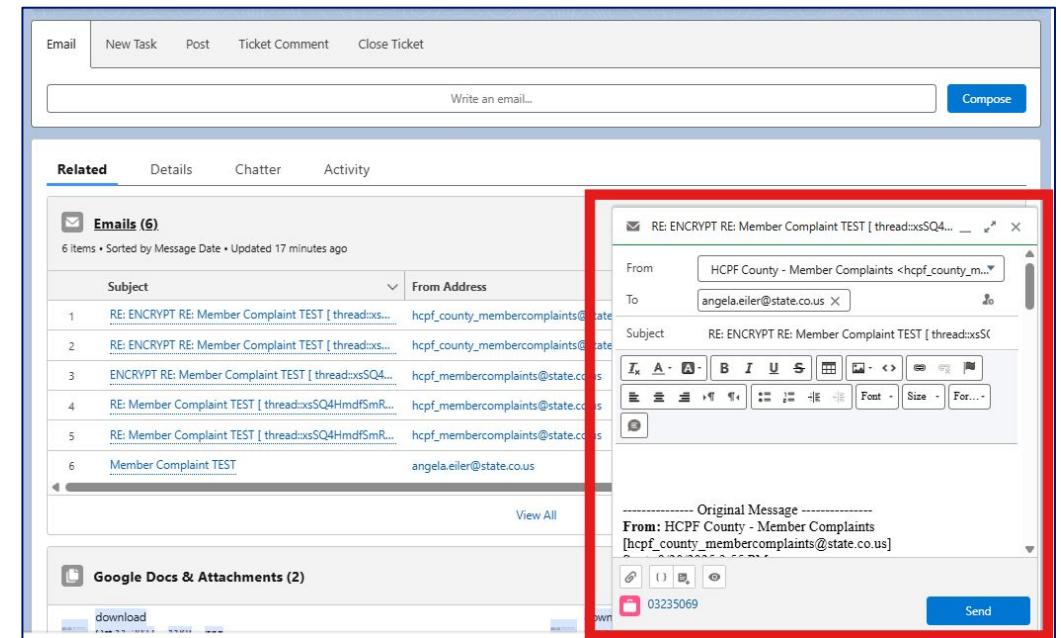
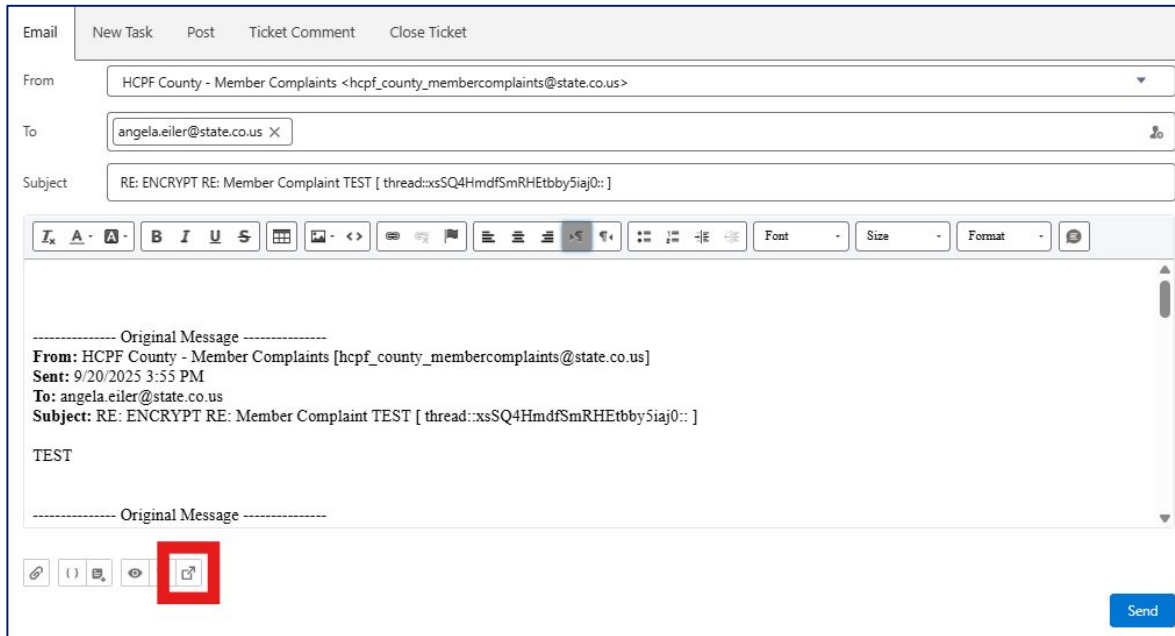
1. Navigate to the “trash can” icon.
2. Confirm that you'd like the email cleared.



Popout to Docked View

Salesforce users have the option to draft their outgoing emails in a separate docked view. They can use the docked view by doing the following:

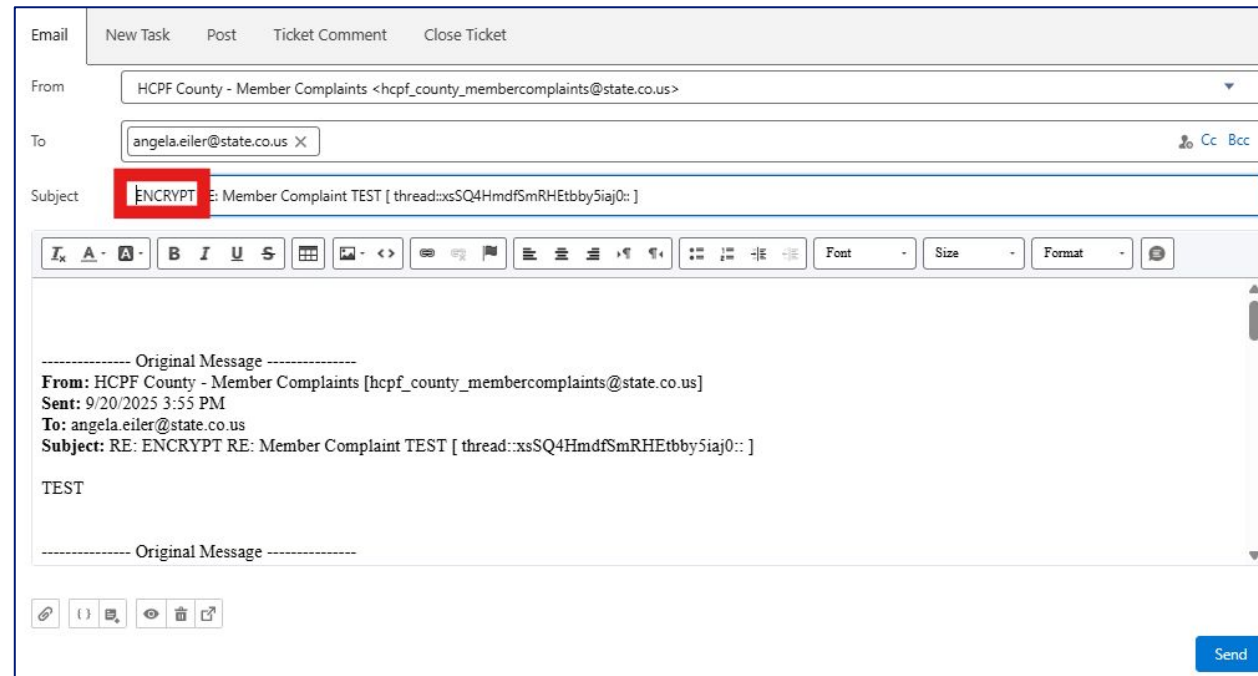
1. Navigate to the “arrow” icon.
2. Finish email in docked view.



How to send an encrypted email from Salesforce

Salesforce users have the option of sending out encrypted email correspondence from Salesforce. They can send encrypted emails by doing the following:

1. Type in “ENCRYPT” in the beginning of the subject line.
2. Use an encrypted email template.



The screenshot displays the Salesforce email composition window. At the top, there are tabs for 'Email', 'New Task', 'Post', 'Ticket Comment', and 'Close Ticket'. The 'Email' tab is selected. Below the tabs, the 'From' field is set to 'HCPF County - Member Complaints <hcpf_county_membercomplaints@state.co.us>'. The 'To' field contains 'angela.eiler@state.co.us'. The 'Subject' field is highlighted with a red box and contains the text 'ENCRYPT RE: Member Complaint TEST [thread::xsSQ4HmdfSmRHETbby5iaj0::]'. Below the subject field is a rich text editor with various formatting options (bold, italic, underline, link, etc.). The email body contains a placeholder for an encrypted email template, showing the following text: '----- Original Message -----', 'From: HCPF County - Member Complaints [hcpf_county_membercomplaints@state.co.us]', 'Sent: 9/20/2025 3:55 PM', 'To: angela.eiler@state.co.us', 'Subject: RE: ENCRYPT RE: Member Complaint TEST [thread::xsSQ4HmdfSmRHETbby5iaj0::]', 'TEST', and '----- Original Message -----'. At the bottom right of the composition window is a blue 'Send' button.

External Communications: Best Practices!

NEW Encryption Exceptions

- New update to Citizen's Details Pages on 10/20: **Encryption Exception**
- Members can now request that HCPF emails be sent to them or their representative without encryption, including those that contain PII/PHI.
- If a member has requested an Encryption Exception, this new box will be checked and a flag will appear on their Citizen Details Page.
 - ❑ **PLEASE NOTE:** This new field can only be populated/approved by the HCPF Privacy Team.

The screenshot displays a web interface for a Citizen's Details Page. At the top, a red banner reads "***** FLAG ON CITIZEN ***** READ NOTICE ON CITIZEN *****". Below this, a red-bordered box contains the text: "ATTENTION Encrypted Exception For members with an approved exception, Doc Control emails will be sent as attachments without encryption." The main form is divided into two columns. The left column contains fields for HCH, State ID, Case Number, Name, Social Security Number Masked, Date of Birth, Gender, Notice on Citizen, and Demographic Info. The right column contains fields for Preferred Phone, Preferred Email, Phone, Mobile, Email, and CLIENT_ID. A red box highlights the "Encryption Exception" field in the left column, which is currently checked. To the right of the form, there are sections for "Tickets (6+)" and "Open Activities (3)".

Subject	Related To	Task
MRM > Citizen > New TASK - a Tes...		☒
TEST	04036894	☒
Task - MRM App on Citizen record >		☒

Escalations: Internal Communications

Escalations: Internal Communications

- In the Escalations: Internal Communications module, you reviewed how Salesforce users can communicate with each other on tickets internally via the following methods:
 - Posts
 - Ticket Comments
- We will briefly cover these methods together, as well as review some best practices in Salesforce!

Posts

The Post functionality allows Salesforce users to communicate about tickets internally. This section utilizes “Mentions” (aka tags) to alert other Salesforce users to review ticket information. Users can create Posts by doing the following:

1. Click on the Post tab.
2. Type in “@” then the name of the user you’d like to mention.
3. Once a person has been mentioned and a message has been drafted, click the blue Share button.
4. Ensure the Post was successfully saved.

Creating Posts

EmailNew TaskPostTicket CommentClose Ticket

@[Angela Eiler] could you take a look at this ticket?

BBIU^x

☰☷



To Colorado HCPF Only ▼



Share

To link to a record, enter / then start typing the record name.

Confirm Post was Saved

Citizen Details

Name

Anonymous

Anonymous-CR

Preferred Email

Case Number

Anonymous

Anonymous-CR

Account MASTER

Preferred Phone

Coverage Status

Social Security Number Masked

State ID

Date of Birth

1/1/1901

Ticket Details

Contact Name

Anonymous

Anonymous-CR

Status

Closed

Subject

Member Complaint

TEST

Ticket Type

INTERNAL USE ONLY - Invalid Request

Ticket Sub-Type

County Action

Description

TEST

T1: In Pro... T1: Succe... T1: Not S... T2: Pendi... T2: In Pro... T2: Succe... T2: Not S... Closed

Status: Closed

Mark Status as Complete

Email New Task Post Ticket Comment Close Ticket

Share an update...

Share

Related Details Chatter Activity

Most Recent Activity

Search this feed...

All Updates Emails Private Answers Call Logs Text Posts Status Changes

Angela Eiler

To: Internal

@Angela Eiler could you take a look at this ticket?

Comment

December 28, 2023 at 3:50 PM

 **COLORADO**
Department of Health Care
Policy & Financing

23

Ticket Comments

The Ticket Comment functionality allows users to document important information in the Chatter section of the ticket. Users can create Ticket Comments by doing the following:

1. Click on the Ticket Comment tab.
2. Draft the message you'd like to be logged in the ticket.
3. Click on the blue Save button.
4. Ensure the Post was successfully saved.

Creating Ticket Comments

Citizen Details

Name

Anonymous

Anonymous-CR

Case Number

Anonymous

Anonymous-CR

Account MASTER

Coverage Status

State ID

Preferred Email

Preferred Phone

Social Security Number

Masked

Date of Birth

1/1/1901

T1: In Pro...

T1: Succe...

T1: Not S...

T2: Pendi...

T2: In Pro...

T2: Succe...

T2: Not S...

Closed

Status: Closed

✓ Mark Status as Complete

Email

New Task

Post

Ticket Comment

Close Ticket

Awaiting guidance from leadership on next steps

Save

Related

Details

Chatter

Activity

Confirm Ticket Comment was Saved

Citizen Details

Name

Anonymous

Anonymous-CR

Preferred Email

Case Number

Anonymous

Anonymous-CR

Account MASTER

Preferred Phone

Coverage Status

Social Security Number

Masked

State ID

Date of Birth

1/1/1901

Ticket Details

Contact Name

Anonymous

Anonymous-CR

Status

Closed

Subject

Member Complaint

TEST

Ticket Type

INTERNAL USE ONLY - Invalid Request

Ticket Sub-Type

County Action

Description

TEST

T1: In Pro...

T1: Succe...

T1: Not S...

T2: Pendi...

T2: In Pro...

T2: Succe...

T2: Not S...

Closed

Status: Closed

✓ Mark Status as Complete

Email

New Task

Post

Ticket Comment

Close Ticket

Write an email...

Compose

Related

Details

Chatter

Activity

Most Recent Activity

Search this feed...

All Updates

Emails

Private Answers

Call Logs

Text Posts

Status Changes

Angela Eiler

To: Internal

Awaiting guidance from leadership on next steps.

Comment

Just now

Angela Eiler

@Angela Eiler could you take a look at this ticket?

7m ago

Internal Communications: Best Practices!

Limit Casual Conversations in Chatter

- Salesforce ticket information are subject to CORA requests, which includes related emails, Posts, and Ticket Comments.
- Only professional language and necessary internal conversations regarding escalations should occur in Chatter.
- All other casual conversations need to take place outside of Salesforce.



Q & A

Let's Log Into Salesforce!

Let's Log Into Salesforce!

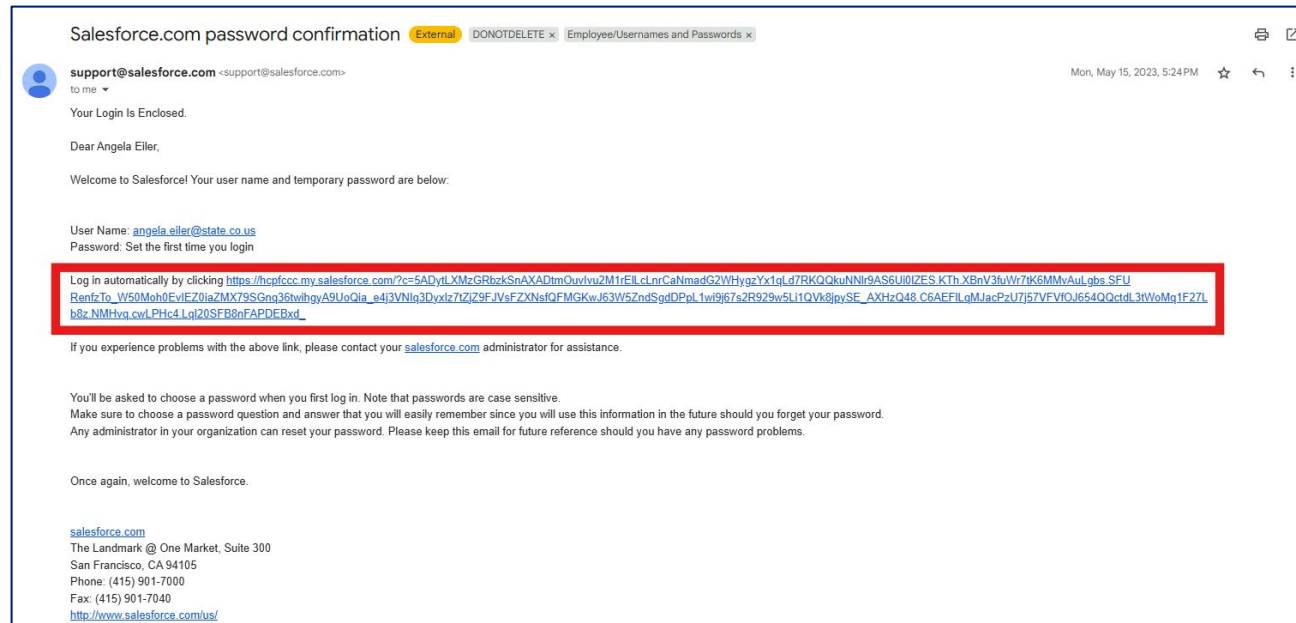
- If you completed all of your modules by yesterday (10/29) @ 4PM, your information was sent to our Salesforce team to create your login!
- You should have received an email from support@salesforce.com prior to this meeting with a link to create your password.

Let's Log Into Salesforce!

- If you have not yet completed all of your modules, you will have access to Bright until EOD Monday, 11/3.
- If you can complete your modules by then, the Strategy team can schedule time with you to get you into Salesforce!
- If you cannot complete you modules by then, please connect with the Strategy team for next steps.

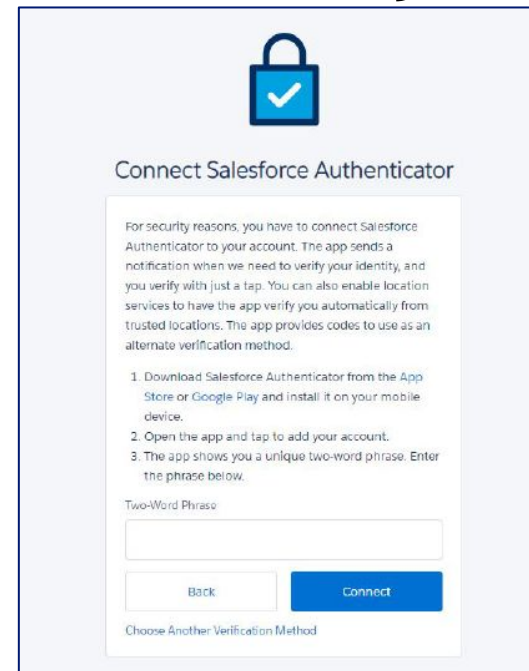
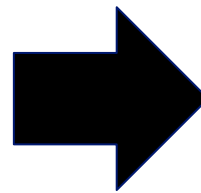
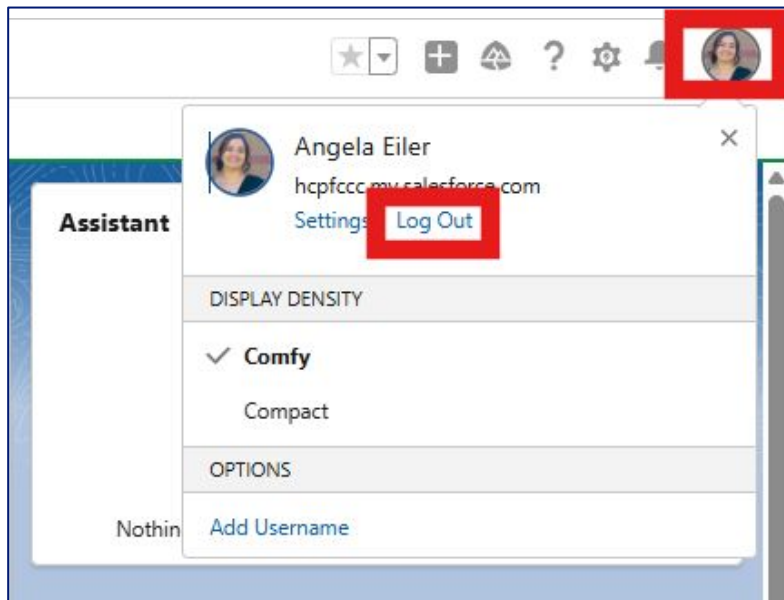
Let's Log Into Salesforce!

- Your access email should have the subject line: Salesforce.com password confirmation
- The email will have a link for you to log into Salesforce and set up your password. Please take a moment to do that now!
- Reminder: You will not be prompted to create your MFA with your personal device until your second login.



Let's Log Into Salesforce!

- After setting up your password and logging in for the first time, log out on the top right corner.
- Log back in to Salesforce, but this time you will be prompted to set up MFA. Please take a moment to do that now!
- We've asked our friends with the Salesforce Team to join our call to help users set up their MFA!





Questions?



COLOR

Department of Health Care
Policy & Financing

Need Help?

HCPF_PCA_Strategy@state.co.us

Submit a County Relations Webform, [click here!](#)