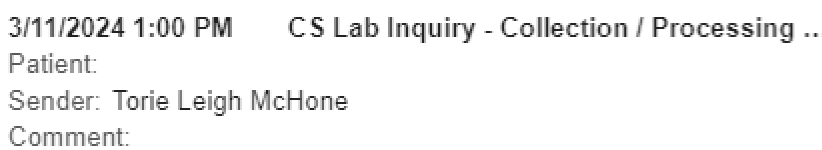
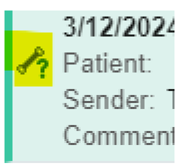
Atrium Health Wake Forest Baptist	**DOCUMENT TYPE:** Form	**ORIGIN DATE** New
CLIA Lab Director: Dr. Gregory Pomper	**LAB DEPARTMENT:** Lab Client Services	**CONTACT:** Lab Client Services

1. Click CRM icon on top right of Epic toolbar. This will take you to the CRM In-Basket.

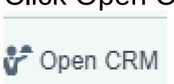
2. Select **CRM** from list. New messages will be in bold.



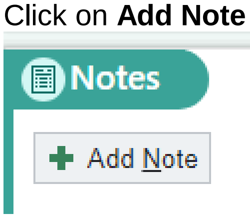
3. Take the baton. This means you are taking the defect to process.



4. Click Open CRM to review. You can also double click the CRM from the list.



5. Click on **Add Note** to create a note with an update on defect.



6. In the Message **Type** box, enter category **Lab**. Type in additional information received or provided by ordering provider in text box below. Click Accept.

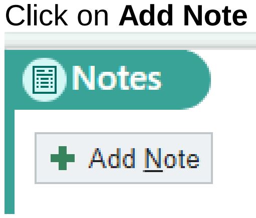
7. If information has been provided and CRM can be closed (for example, notified a provider that a specimen was clotted and needs new order and new collection): Click **Resolve**. Enter **Information Provided** in box. Click **Accept** and **Close/Route** when complete.

   Note: Provide information to the provider by in-basket message, secure chat message, or phone call.

8. If lab is awaiting information such as a new order or specimen source from a provider, leave the CRM open until the information is provided to the lab.

9. To add information from a provider (for example, they send you a secure chat or In Basket with the source, collection time, or say a new order is placed):

10. Click on **Add Note** to create a note with an update on defect.



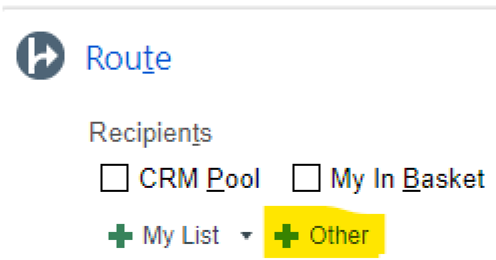
11. In the Message **Type** box, enter category **Lab**. Type in additional information received or provided in text box below. Click Accept. Then Route the CRM to the department that needed the information.

12. Click **Route.** Add the appropriate pool to route the CRM (choose based on where the CRM originated, for example Central Processing):

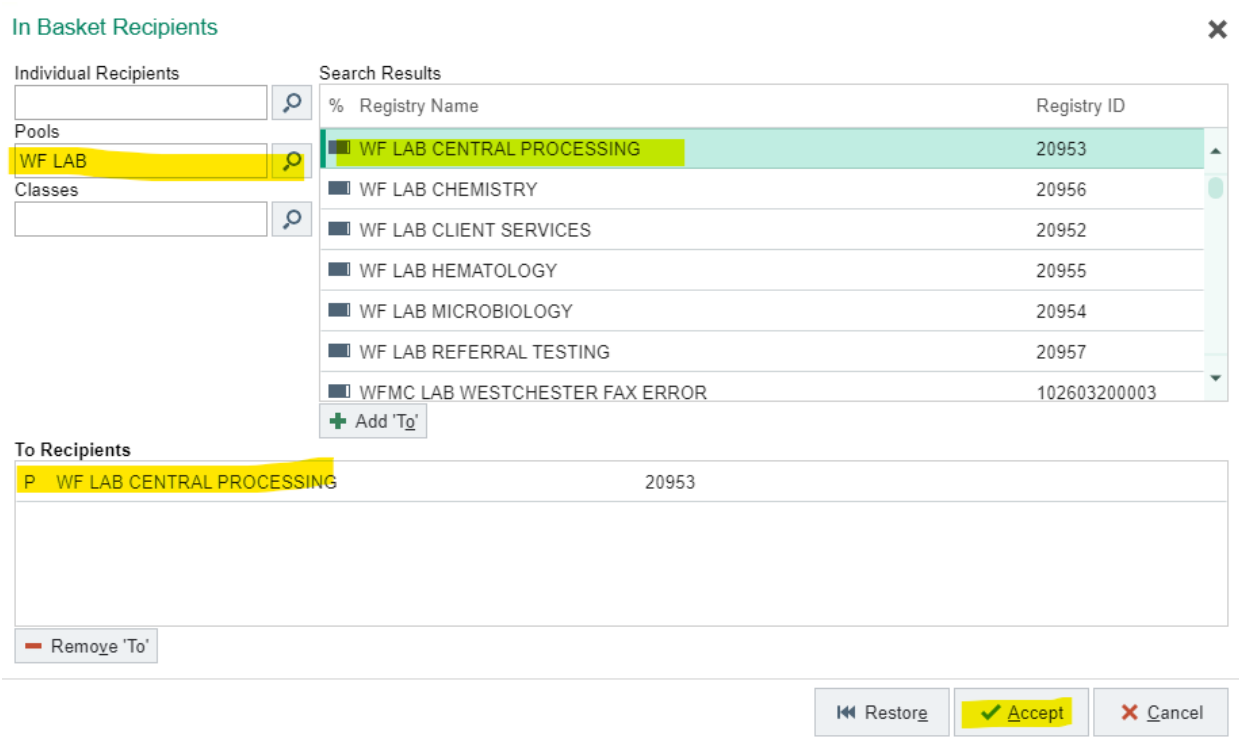
    Available Pools:
    WF LAB Central Processing
    WF LAB Chemistry
    WF LAB Hematology
    WF LAB Microbiology
    WF LAB Referral Testing

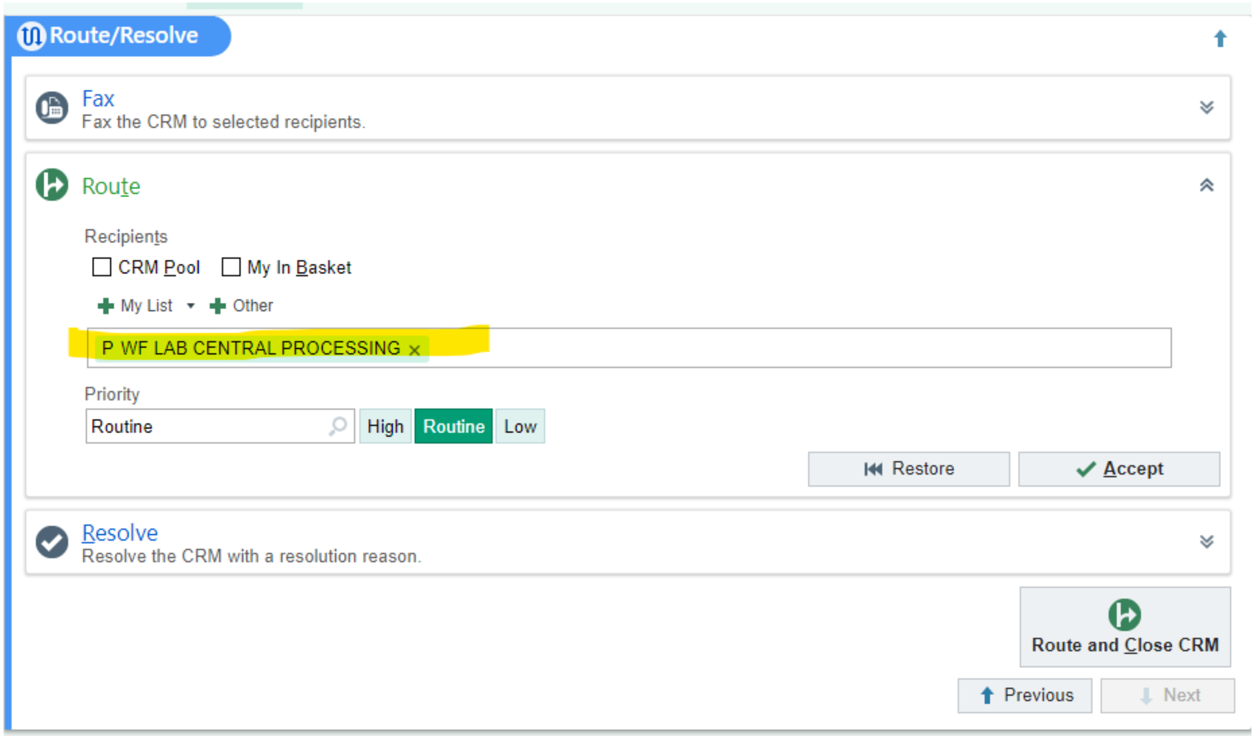
    Click **Route and Close** once appropriate pool is selected. The pool that the CRM is routed to will be responsible for resolving it.

    Note: The first time you route to each of these pools, you will need to search them. Click the **+Other** button.



In the Pools box, search WF LAB and select the appropriate pool from the results. Double-click pool to add to Recipients window. Click Accept. Pool will be added to the Route box in CRM.




Route/Resolve
Fax
Fax the CRM to selected recipients.
Route
Recipients
CRM Pool
My In Basket
My List
Other
P WF LAB CENTRAL PROCESSING
Priority
Routine
High
Routine
Low
Restore
Accept
Resolve
Resolve the CRM with a resolution reason.
Route and Close CRM
Previous
Next