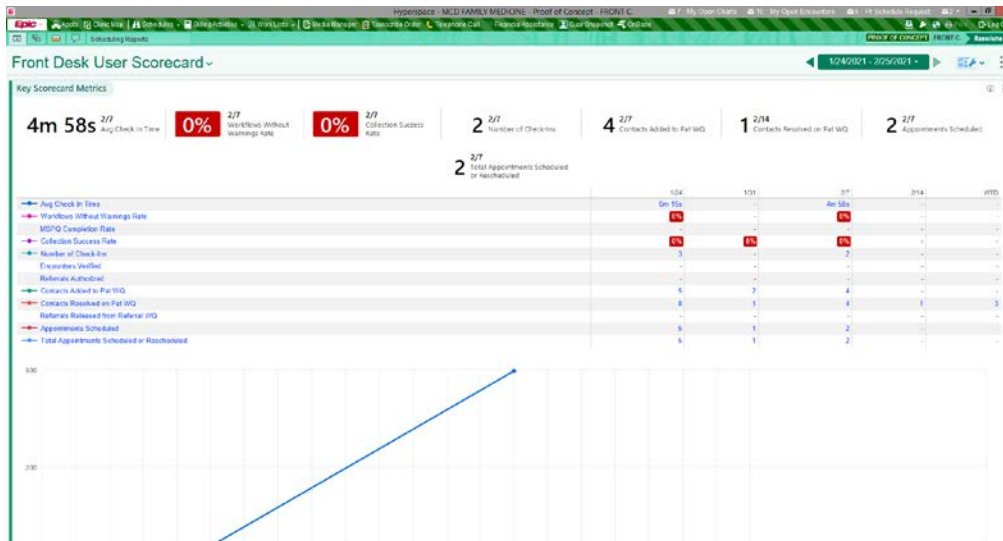
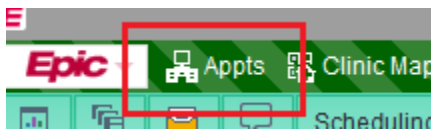


# Appointment Conversion Make an Appointment

1. Receive a list of patient appointments that need to be scheduled.
2. Open up NextGen.
3. Find patient's appointment (in NextGen).
4. Open up PRD Hyperspace.



5. Click search for Appts.



6. Look up patient MRN.

Patient Lookup

Select Patient Patient Search Recent Patients Family/Group Temporary Groups

Name/MRN:  EPI ID:

SSN:  Sex:

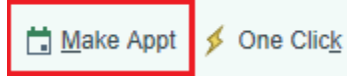
Birth date:  Zip Code:

Phone #:

Use sounds-like

7. Click Make Appt activity.

## Appointment Desk



8. Select correct department.

- a. Location/Specialty = Department.

## Make Appointment



Department:   

9. Write reason of visit in Appt Notes.

- a. Appt notes = NextGen Details section

Appt notes:

10. Select Appropriate Visit Type

Visit type:   

11. Select Provider

- a. Select provider listed in NextGen.

Provider or resource:

PROVIDER POOL

- DAO, TU ANH N, NP [153] in MCD FAMILY MEDICINE [10201101]
- DOCTOR, PAUL, MD [911] in MCD FAMILY MEDICINE [10201101]
- FAMILY MEDICINE, PHYSICIAN, MD [E1000] in MCD FAMILY MEDICINE [10201101]
- HAN, MI-HYUN, NP [168] in MCD FAMILY MEDICINE [10201101]
- LOAD, TEST03412, MD [912] in MCD FAMILY MEDICINE [10201101]
- LOAD, TESTAGHHF, MD [913] in MCD FAMILY MEDICINE [10201101]
- MYERS, DANIELLE, MD [116] in MCD FAMILY MEDICINE [10201101]
- SHARMA, ABHILASHA, MD [69] in MCD FAMILY MEDICINE [10201101]

**12. Search for appointment with the provider listed in NextGen.**

- a. Select provider
- b. Right click and select “Only use this provider”
- c. If Provider Pool doesn’t automatically come up search for provider.

Provider or resource:

---

☐ PROVIDER POOL

DAO, TU ANH N, NP [153] in MCD FAMILY MEDICINE [10201101]

DOCTOR, PAUL, MD [911] in MCD FAMILY MEDICINE [10201101]

FAMILY MEDICINE, PHYSICIAN, MD [E1000] in MCD FAMILY MEDICINE [10201101]

HAN, MI-HYUN, NP [168] in MCD FAMILY MEDICINE [10201101]

LOAD, TEST03412, MD [912] in MCD FAMILY MEDICINE [10201101]

LOAD, TESTAGHHF, MD [913] in MCD FAMILY MEDICINE [10201101]

MYERS, DANIELLE, MD [116] in MCD FAMILY MEDICINE [10201101]

SHARMA, ABHILASHA, MD [69] in MCD FAMILY MEDICINE [10201101]

Only Use This Provider

Remove This Provider

Provider or resource:

---

☐ PROVIDER POOL

SHARMA, ABHILASHA, MD [69] in MCD FAMILY MEDICINE [10201101]

**13. Appointment for date listed in NextGen.**

Provider

Subgroup

Department

Specialty

In network

Patient Options ▼

Start search on:

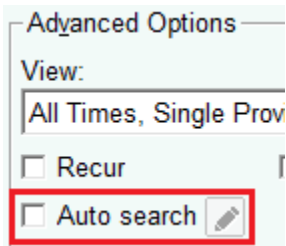
4/1/2021

◀ April ▶ ◀ 2021 ▶

S	M	T	W	T	F	S
28	29	30	31	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	1
2	3	4	5	6	7	8

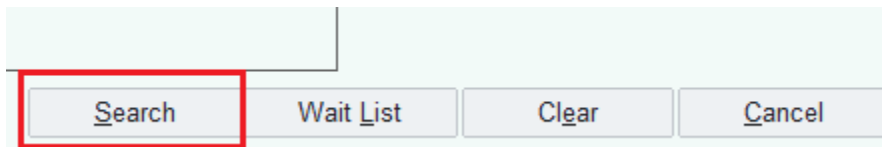
📅 Today

**14. Uncheck Auto search**



The image shows a dialog box titled "Advanced Options". It contains a "View:" dropdown menu with the text "All Times, Single Prov". Below the dropdown are two checkboxes: "Recur" and "Auto search". The "Auto search" checkbox is highlighted with a red rectangular border.

**15. Search for appointment**



The image shows a row of four buttons: "Search", "Wait List", "Clear", and "Cancel". The "Search" button is highlighted with a red rectangular border.

**16. Travel Screening Questionnaire**

- a. Patient must answer these questions.
- b. If the patient is not present, click cancel to proceed without completing.

Travel Screening x

**Bob Test**      Male, 62 years, 2/20/1959      MRN: 203662

---

**Communicable Disease Screening**

In the last month, have you been in contact with someone who was confirmed or suspected to have Coronavirus / COVID-19?

📄

Have you had a COVID-19 viral test in the last 14 days?

📄

Do you have any of the following new or worsening symptoms?

<input type="checkbox"/> None of these	<input type="checkbox"/> Unable to assess	<input type="checkbox"/> Abdominal pain	<input type="checkbox"/> Bruising or bleeding	📄
<input type="checkbox"/> Chills	<input type="checkbox"/> Cough	<input type="checkbox"/> Diarrhea	<input type="checkbox"/> Fatigue	
<input type="checkbox"/> Fever	<input type="checkbox"/> Joint pain	<input type="checkbox"/> Loss of smell	<input type="checkbox"/> Loss of taste	
<input type="checkbox"/> Muscle pain	<input type="checkbox"/> Rash	<input type="checkbox"/> Red eye	<input type="checkbox"/> Runny nose	
<input type="checkbox"/> Severe headache	<input type="checkbox"/> Shortness of breath	<input type="checkbox"/> Sore throat	<input type="checkbox"/> Vomiting	
<input type="checkbox"/> Weakness				

---

**Travel History**

Have you traveled internationally or domestically in the last month?

📄

Enter a location

📄 No Documented Travel

**17. Search for the correct time.**

- a. If appointment in NextGen ends in :10 -> In Epic :15
  - a. :10 -> :15
  - b. :20 -> :15 or :30 (choose best time based on provider availability)
  - c. :40 -> :45
  - d. :50 -> :45 or :00 (choose best time based on provider availability)
- b. Once you find correct appointment time, select desired appointment and click schedule.

## Provider Schedule

SHARMA, ABHILASHA [69] in MCD FAMILY MEC  View: All Times, Single Provider

4% Thu 4/1/2021 OFFICE VISIT - 15 minutes

	Time	Pri?	MRN	Name	Visit Type	Len	Appt Notes
1	8:00 a						
1	8:15 a						
1	8:30 a						
1	8:45 a						
1	9:00 a			New Patient(1)			
			203662	Test,Bob	Office Visit	15	DM Follow up
	9:15 a		END				
1	9:30 a						
1	9:45 a						
2	10:00 a			TCM(1)			
	10:15 a		END				
1	10:30 a						
1	10:45 a						
1	11:00 a						
0	11:15 a						
0	11:30 a						
	11:45 a		END				
2	1:00 p			New Patient(1)			
	1:15 p		END				
1	1:30 p						
1	1:45 p						
2	2:00 p			TCM(1)			
	2:15 p		END				
1	2:30 p						
1	2:45 p						
2	3:00 p			New Patient(1)			
	3:15 p		END				

Day Week More Providers Restrictions Skipped

### 18. Review appointment information and accept to close.

Appointment Review

Thursday Apr 1, 2021

Arrive by 8:45 AM  
Appt at 9:00 AM (15 min)

Abhilasha Sharma, MD

MCD FAMILY MEDICINE at Merced Suites

OFFICE VISIT

Insurance (None) Copay (None)

Effective Dates (None)

Early Arrival Reason  
Please arrive 15 minutes early to complete registration information prior to appointment.

Department Address  
847 West Childs Ave.  
Merced CA 95341

Notes  
DM Follow up

Patient Instructions  
Please bring any insurance information and a copayment if required by your insurance company.

### 19. Patient's registration will automatically open.

- a. Open Checklist on the right side of the registration.


Patient Sidebar Checklist

Hide verified items

---

**5 Verifications Remaining**

- b. Look for Accident Related hyperlink to go to the Visit Info form.
  - a. NextGen Details section will mention if appt is accident related.

 The 'Accident related?' field is blank.  
Please input this information. [R-100868]

- c. Answer question.

Accident related?

**20. Accept to close patient's registration.**