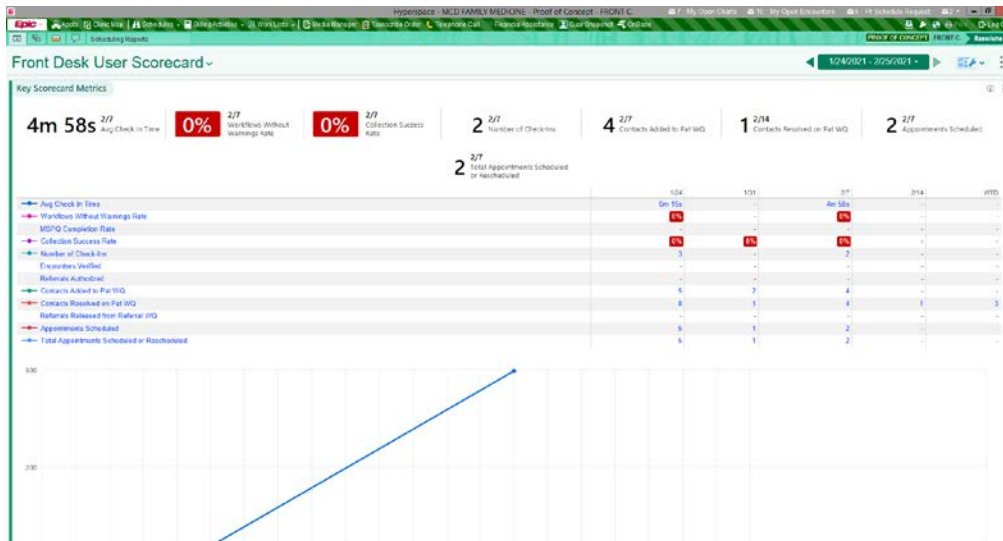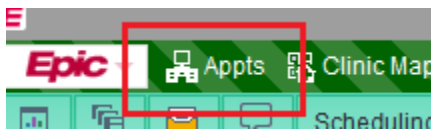# Appointment Conversion Make an Appointment

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.**

7. **Click Make Appt activity.**

Appointment Desk

📅 Make Appt | ⚡ One Click
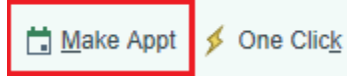
8. **Select correct department.**
    a. Location/Specialty = Department.

Make Appointment

Department: MCD FAMILY MEDICINE [10201101] 🔍 ▼

9. **Write reason of visit in Appt Notes.**
    a. Appt notes = NextGen Details section

Appt notes: DM Follow up

10. **Select Appropriate Visit Type**

Visit type: Px/Dx

office visit 🔍

OFFICE VISIT [1004]

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
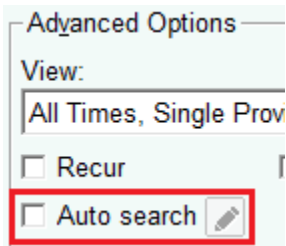☐ In network

PCP
Team

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
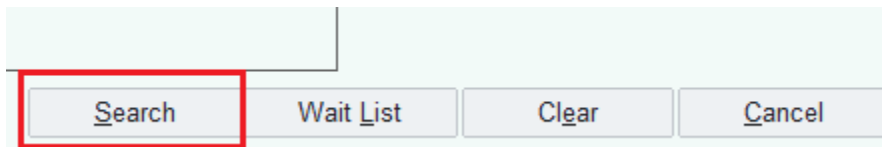
📅 Today

14. Uncheck Auto search

15. Search for appointment

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

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 ☐ Ski

← Previous | → Next | ✓ Schedule | Cancel

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

19. **Patient's registration will automatically open.**
    a. Open Checklist on the right side of the registration.

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

c. Answer question.

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