HotDoc Payments
CHANGE MANAGEMENT CHECKLIST

If viewing this digitally, you can click the underlined text to open a related page in our Support Centre or HotDoc Academy

PRE-LAUNCH

- ☐ Download the **HotDoc Payments Setup Checklist** and complete the payment provider setup step
- ☐ Familiarise yourself with how HotDoc Payments works by completing the **HotDoc Academy Payments for Practice Managers course**
- ☐ Set your **HotDoc Payments launch date**, ensuring you have time to complete remaining pre-launch tasks
- ☐ **Educate and train your team**. They can complete Payments training in HotDoc Academy
  HOT TIP: Nominate a team member to become your practice's HotDoc Payments Champion
- ☐ Create a **back-up plan** for the initial weeks of using HotDoc Payments, while your practice and patients are working through the change
- ☐ Create a HotDoc Payments **FAQ page for your patients** which your team can help contribute to
  HOT TIP: You could link from your FAQ page to HotDoc's Patient Help articles - help.hotdoc.com.au
- ☐ **Communicate upcoming changes** to patients via email, on your website, and posters in your waiting room
- ☐ **Post every week on social media** using HotDoc's digital image resources to advise that the changes come into effect from your launch date and what this means for your patients
  HOT TIP: You can use your patient's comments and questions for your Payments FAQ page

FROM YOUR LAUNCH DATE

- ☐ **Print copies of your FAQs page** for your team to hand out to patients at the practice
- ☐ Enable HotDoc Payments for your **online and practice booked appointment types**
- ☐ Remind your team of the process for **collecting and receipting payment** with HotDoc
- ☐ **Tell patients** that you're now using HotDoc Payments and what type of request messages to expect
  HOT TIP: Update your phone's on-hold message to mention that you're now using HotDoc Payments
- ☐ Update your waiting room HotDoc Payments posters from **'we're switching...' to 'we're now using...'**
- ☐ Play HotDoc Payments **videos in the waiting room** and/or display HotDoc Payments TV slides
- ☐ Keep **updating your patient FAQs page** based on incoming questions from patients

POST-LAUNCH

- ☐ Regularly check if your team has **any questions about the new HotDoc Payments process** or if they need additional training
- ☐ **Ask your patients for feedback** about the process and if they have any questions

NEED MORE INFORMATION?
Check out HotDoc Academy and our Support Centre to learn more about HotDoc Payments
academy.hotdoc.com.au   support.hotdoc.com.au

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