



# HotDoc Payments

## SETUP CHECKLIST

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

### SET UP YOUR PAYMENT PROVIDER

- ☐ Create your practice's **Stripe or Pin account** by following [prompts on Payments Setup page](#)
- ☐ For Pin accounts, once you receive your **API key**, add this on Payments Setup where prompted

### PASS ON THE PROCESSING FEE?

- ☐ If you want to pass the fee on to patients, [enable 'Patient pays processing fee' setting](#) on Payments Setup

### EXEMPT BULK BILLING PATIENTS?

- ☐ If you don't want bulk billing eligible patients to be asked to add a payment method, [enable the 'Exempt payment for bulk billed patients' setting](#) on Payments Setup page

### SET UP AUTOMATIC REQUESTS FOR YOUR APPOINTMENT TYPES

- ☐ On Payments Setup page, select the **Appointment Setup tab**, then click the Setup button next to the Online Booked Appointment type you'd like to [enable for Payments](#)  
*After enabling payments on the online appointment type, you'll be prompted to enable payments for the linked appointment type in your practice software, which we highly recommend*
- ☐ **Repeat** the above step for each appointment type you'd like to enable Payments for

### LET PATIENTS KNOW TO EXPECT A REQUEST FROM HOTDOC

- ☐ **Let patients know** they can [expect a message from HotDoc](#) requesting them to provide a payment method at time of booking
- ☐ Use our [digital and printable resources](#) to educate patients about HotDoc Payments in your waiting room, on your website and on social media

### SET YOUR TEAM UP FOR SUCCESS WITH THESE TIPS

- ☐ **Train your team** on how to use Payments and any policies or processes unique to your practice  
*On demand training is available in [HotDoc Academy](#)*
- ☐ Encourage your team to **let patients know** to expect a request from HotDoc asking to provide a payment method
- ☐ Remind your team to [collect payments](#) in the HotDoc Dashboard after appointments

### NEED MORE INFORMATION?

Check out HotDoc Academy and our Support Centre to learn more about HotDoc Payments  
[academy.hotdoc.com.au](https://academy.hotdoc.com.au)  
[support.hotdoc.com.au](https://support.hotdoc.com.au)