



HotDoc Payments for Best Practice

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

ENABLE BEST PRACTICE AUTOMATIONS?

- ☐ Activate the [automatic collect and receipt settings](#), allowing HotDoc to automatically process payment once the account is stored in Best Practice and automatically receipt the account once payment has been taken.
If you're not enabling these settings, ensure your team are aware of the manual processes they need to complete

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 support.hotdoc.com.au

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