HotDoc for Practitioners: Managing Repeat Requests
SETUP & HOW TO CHECKLIST

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1. CREATE ACCOUNT AND SEND INVITE TO PRACTITIONER

☐ Create an account for the practitioner by <u>sending them a user account invitation</u> via the HotDoc Dashboard using the **practitioner's email address**

☐ Practitioner receives a user account email invitation and sets a password

2. INSTALL HOTDOC ON PRACTITIONER'S COMPUTER

☐ Install the HotDoc Sidebar on the practitioner's computer so they can start receiving requests. We recommend asking your IT to do this - **How to download the HotDoc Sidebar**

3. FOR PRACTITIONERS: VIEW AND MANAGE REPEAT REQUESTS

☐ Once HotDoc is installed, practitioners can log in with their email address and password. Select **Pending Requests** to view the prescription or referral requests from patients

☐ Practitioners can then generate requests in their practice software and **mark them as complete in HotDoc**, or alternatively **decline** or **reassign it** to another practitioner. Share this guide **What practitioner's need to do when actioning repeat requests in the Sidebar** to show them how it works.

☐ If the request is **approved**, the patient's card will be charged and they'll receive a confirmation email of their request including <u>any custom practitioner notes</u>.

☐ If the request is **declined**, the patient's card **will not** be charged and they'll receive an email informing them of the outcome including <u>any custom practitioner notes</u>.

5. REVIEW THE DAILY SUMMARY EMAIL

☐ Check the <u>daily email</u> sent to your <u>nominated email address</u> each morning which includes **pending and expired requests** that require actioning, as well as stats for new, completed and declined requests

6. MANAGE ANY EXPIRED REQUESTS

☐ Requests expire after 5 business days and won't appear in the Practitioner Sidebar. We recommend checking for requests with 'Authorisation Expired' in the **Prescription Requests & Referral Requests section of the HotDoc Dashboard** throughout the week and follow up with these patients directly. Patients are not charged for expired requests