HotDoc Routine Requests Setup Checklist

1 Log in to the HotDoc Sidebar

Open the HotDoc Sidebar and log in

- Log in to the Sidebar with your registered email address and password.

2 View Routine Requests

Review pending requests

- Select '**Pending Requests**' to review outstanding repeat prescription or referral requests from patients.
- You'll receive **alerts** on the corner of your screen for new requests. Click this to open the request automatically.

3 Open Patient File

Open patient file and pin requests

- Click '**Open patient file**' to automatically open their file in your practice software *(Best Practice/Medical Director only)*.
- Use the **copy icon** next to **name/mobile/DOB** to search for patient manually.
- Select '**Pin request**' to automatically pin the request to your screen.

4 Start Managing Requests

Approve, decline or reassign requests and add a comment

- Click '**Copy request details**' to easily paste the request into the patient's file.
- **Send a note to the patient** to communicate with them directly upon approving or declining their request (optional). This will be included in the patient's confirmation email.
- To **approve** a patient's request, select '**Mark as complete**' after actioning this and the patient's card will be charged. They'll receive a confirmation email including any notes you added.
- To **decline** the request, select **'Decline request**' and the patient's card will not be charged. They will receive a confirmation email including any notes you added.
- You can click '**Reassign request**' and select a **different practitioner** to action the patient's request if required.

5 Check Incoming Requests

Notifications for new requests

- Alongside the alerts sent to your computer, your practice will also receive a daily summary email with outstanding requests in case you miss a request.

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Visit practices.hotdoc.com.au for more information.