

EXISTING PATIENT PROFILE

Basic information

- Age, marital status, children
- Does spouse come to practice?
- Do children come to practice?

Basic relationship

- How long with the practice?
- How did they come to us?
- If they were invited, was the invitation driven by care the invitee had received?
- Who have they invited, & what level of care did the invited receive?

Basic behaviors

- Hygiene status (any past issues?)
- Payment status (any past issues?)
- Appointing status (any past issues?)
- Home care habits

Basic treatment

- Date & procedure last accepted
- When was the last comprehensive treatment discussion?
- Key factor why they chose to wait?
- Has there been a change or progression in their oral health condition since then?
- Has the change been communicated?
- Was treatment recommended?
- Was there co-diagnosis?
- Use of client education tools
- Use of digital/IOC/imaging
- Clarity for untreated prognosis
- Insurance/financing mindset

Client interaction

- Do they own the clinical vision with clarity
- Expressed interests & previous questions
- Client sensitivity & issues with past care

What's new?

- Changes in the practice since the last comprehensive discussion

Image & demographics

- Attention to appearance
- Works in a job that requires leadership or influencing?
- Career ambitions & goals
- Social group & values
- Anti-aging opportunities
- How would they rate their smile?
- Have we asked the right questions?

Who in the practice has best relationship with the client?

- What else do we know about the patient?