

THE DOCUMENTATION DEFENCE™

Consultation Documentation Checklist

A patient-specific prompt from first concern to agreed next step.

Educational prompt only. Adapt it to the patient, treatment, your profession, scope, current guidance, insurer terms, clinic policy and record system. This is not legal advice and does not certify compliance. Do not place identifiable patient information in an unsecured copy.

What brought the patient here

☐	Patient identity and communication needs confirmed under clinic policy.
☐	Patient's concern, priorities and desired outcome recorded in their terms.
☐	Expectations and any time-sensitive reason for seeking treatment explored.
☐	Previous aesthetic treatment and response recorded where relevant.

Current information and assessment

☐	History reviewed today, with changes, medicines and allergies recorded as applicable.
☐	Relevant clinical and psychosocial factors considered within competence.
☐	Assessment findings and relevant negatives recorded only where actually checked.
☐	Photographs or measurements linked securely when clinically relevant and appropriately agreed.

The decision

☐	Options, including no treatment where relevant, recorded proportionately.
☐	Suitability, modification, deferral, decline or referral decision explained.
☐	Patient questions, concerns and the information shared recorded.
☐	Agreed plan, aftercare route, review point and next owner made clear.

Patient-specific priority	
Finding that shaped my decision	
Decision and reason	
Agreed next step	