PRINTABLE CLINIC WORKFLOW

Aesthetic Treatment Documentation Checklist

A practical two-page workflow for clinics and independent practitioners

Use this checklist before, during and immediately after saving a treatment record. It supports a consistent documentation routine without replacing professional judgement, clinic procedures or applicable local requirements.

01 Start with the right record

- ☐ Confirm the correct patient record and practitioner account are open.
- ☐ Confirm the patient name and treatment date shown in the workflow.
- ☐ Review whether anamnesis and consent steps required by your clinic are complete.
- ☐ Select the treatment type before moving to zone documentation.

02 Record what was used

- ☐ Select the documented product and copy the batch or lot identifier from its source label.
- ☐ Record the treatment date and cost using your clinic's chosen convention.
- ☐ Do not guess missing product, lot or batch information; flag it for resolution.
- ☐ Add operational notes required by your clinic's internal workflow.

03 Map the treatment

- ☐ Select every treated zone that belongs in the record.
- ☐ Enter the documented units or volume for each point or zone in the app.
- ☐ Review marker positions and zone names before continuing.
- ☐ Let Aesthetic Pass calculate the total from zone entries, then compare the total with those entries.

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Review, save and verify

Complete the second page before leaving the record. Photos remain optional; the saved treatment should still be checked even when no photos are used.

04 Add photos only when useful

- [ ] If photos are part of the workflow, verify the correct patient and treatment before selecting them.
- [ ] Use consistent, neutral capture conditions according to your clinic's photo procedure.
- [ ] Choose up to three before photos and up to two after photos; either group may be left empty.
- [ ] Wait for upload confirmation. If the network is interrupted, stay with the record and retry.

05 Run the final review

- [ ] Treatment type, date and cost are correct.
- [ ] Product and lot or batch information match the source label.
- [ ] All intended zones and quantities are present and the calculated total is plausible for the entries.
- [ ] Optional photos and notes belong to this patient and this treatment.

06 Save and verify

- [ ] Do not leave the workflow until the save action reports completion.
- [ ] Reopen the patient's timeline and confirm the treatment appears once with the expected details.
- [ ] If an upload fails, retry from the same record where possible and avoid creating a duplicate treatment.
- [ ] If a correction is needed, use the edit path and repeat the final review.

Exception and handoff notes

Missing information to resolve	
Upload retry or correction needed	
Owner and follow-up date	

Operational checklist only. It is not medical or legal advice and does not certify that a record meets every requirement applicable to your practice. Adapt it to your procedures and jurisdiction.