



1. Profiling the Patient

The Importance of Your Office Form

Profiling is the first step in assessing the consumer's finance information. Profiling is done through filling out a form with the proper information that obtains a profile so you, as the finance coordinator, can direct the finances to close the new person.

Sample Profiling Questions

The information on the "profile form" are questions to find out:

a) Name (first) _____ (last) _____

d) Address: City _____ State _____ ZIP _____

c) How long have you lived in the area? _____

d) Occupation _____

e) Name of spouse _____

f) Spouse's occupation _____

g) Children:

name _____ Age _____

Name _____ Age _____

Name _____ Age _____

Name _____ Age _____

h) Relatives who live in the area? ___ Parent(s) ___ Brother(s)/Sister(s) ___ Grandparents ___ Other

i) Do you have insurance? Name of carrier? _____

j) SSN: _____

k) Is a monthly payment plan important for assisting in your treatment?

l) Cost of treatment has different ranges depending on the type of case, length of time and severity of dental procedures needed. Our office makes financial plans and effort to assist you and your family to obtain the treatment you need.

We offer several patient funding services such as Care Credit, Lending Club and Simple Pay.

Please let us know what works best to fit your needs.
