

THE CLINICAL DETECTIVE: ROOT CAUSE DISCOVERY WORKSHEET

Client Name: _____ Date: ____ Practitioner: _____ Phase: Reveal & Organize

SECTION 1: THE "REVEAL" (Identifying the Missing Links)

Instructions: Complete this section during the intake interview to capture context beyond basic symptoms.

1. The "Why Now?" Factor What changed in the last 30–90 days that prompted you to seek help *this specific week*?

2. Environmental & Life Transitions Check any that apply within 6 months of symptom onset: - ☐ Moved house/apartment (Testing for mold/water damage) - ☐ Changed jobs or workplace environment - ☐ Recent travel (International or wilderness) - ☐ Major life stressor/trauma (The "Emotional Anchor")

3. The Dental Connection - ☐ History of root canals? - ☐ Presence of silver (amalgam) fillings? - ☐ Known gum disease or "cavitations"? - ☐ Recent dental surgery?

SECTION 2: THE "ORGANIZE" (Systemic Synthesis)

Instructions: Do not just list symptoms. Draw arrows between nodes to show how one affects the other (e.g., Gut → Brain).

Matrix Node	Primary Symptoms	Connection to Other Nodes
Assimilation (Digestion/Gut)		→ Affects: _____
Defense & Repair (Immune)		→ Affects: _____
Energy (Mitochondria)		→ Affects: _____
Biotransformation (Detox)		→ Affects: _____
Communication (Hormones)		→ Affects: _____

SECTION 3: THE "RULE OF THREE" VALIDATION

Instructions: Before deciding on a clinical target, ensure you have three pieces of evidence to avoid "Anchoring Bias."

Hypothesis (e.g., HPA-Axis Dysregulation): _____

1. Symptom: _____

2. Lab Marker/Finding: _____

3. History/Timeline Link: _____

SECTION 4: PRIORITIZATION & REFLECTION

The "Lead Domino": If we could only address **ONE** node to create the most leverage for this client, which would it be? [] Assimilation [] Defense/Repair [] Energy [] Biotransformation [] Communication

Bias Check (Self-Reflection): - Am I "anchoring" on the client's self-diagnosis? (Yes/No) - Am I closing the case prematurely because I found one low lab value? (Yes/No) - What evidence contradicts my current theory? _____

NEXT STEPS:

1. _____

2. _____

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