

R.O.O.T.S.™ Clinical Synthesis & Keystone Map

Client Name: _____ Date: _____

Instructions: Use this worksheet during or after a complex case review to move beyond symptom management. This tool helps you synthesize genomic data, identify the "Primary Node" of dysfunction, and ensure you are following the "Stability Before Specificity" rule.

Section 1: Advanced Reveal (Genomic & Environmental Synthesis)

Identify the "User Manual" markers and environmental triggers that create clinical bottlenecks.

Key Genomic Markers (Check if present and note impact): - ☐ MTHFR: (Energy/Biotransformation impact) _____ - ☐ COMT: (Stress/Hormone metabolism impact) _____ - ☐ APOE4: (Inflammation/Lipid impact) _____ - ☐ Other SNPs: _____

The Synthesis Bottleneck: (e.g., COMT polymorphism + Mold Exposure = Biotransformation Failure)

Section 2: Matrix Mapping & Primary Node Identification

Map the cross-node communication to find the "Clinical Keystone" (the intervention with the largest ripple effect).

Matrix Node	Symptom Severity (1-10)	Primary or Downstream?
Assimilation (Gut/Microbiome)		<input type="checkbox"/> Primary <input type="checkbox"/> Downstream
Defense & Repair (Immune/Inflammation)		<input type="checkbox"/> Primary <input type="checkbox"/> Downstream
Energy (Mitochondria/Fatigue)		<input type="checkbox"/> Primary <input type="checkbox"/> Downstream
Biotransformation (Liver/Detox)		<input type="checkbox"/> Primary <input type="checkbox"/> Downstream

Matrix Node	Symptom Severity (1-10)	Primary or Downstream?
Communication (Hormones/HPA Axis)		<input type="checkbox"/> Primary <input type="checkbox"/> Downstream

The Clinical Keystone: (The one node/intervention that will unlock the others)

Section 3: Stability Before Specificity Check

Before moving to the 'Target' phase, ensure the foundation is stabilized to avoid a healing crisis.

- ☐ **Blood Sugar:** Is the client stable (fasting glucose/HbA1c/energy dips)?
- ☐ **Sleep:** Is the client getting 7+ hours of restorative sleep?
- ☐ **Elimination:** Is the client moving their bowels daily (clearing the "trash")?
- ☐ **Safety:** Is the client in a "Parasympathetic State" enough to heal?

Foundation Status: ☐ Ready to Target ☐ Needs 2-4 weeks more Optimization

Section 4: The Targeting Sequence

Based on the R.O.O.T.S. Hierarchy, list your intervention steps.

1. Phase 1 (The Gut-Brain/Vagus): _____
 2. Phase 2 (The HPA-T-G Axis): _____
 3. Phase 3 (Biotransformation/Detox): _____
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Section 5: Remission vs. Management Reflection

Functional Remission Goal: (What does "Metabolic Resilience" look like for this specific client?)

Practitioner Observations:

Next Review Date: _____
