

Protocol Readiness & Sequencing Checklist

Client Name: _____ Date: _____

Purpose: Use this tool to determine if a client is physiologically ready to progress to the next stage of their protocol. Following the R.O.O.T.S. Method™ prevents "healing crises" and ensures maximum supplement efficacy.

Section 1: Phase 1 – Foundational Stability (Optimize)

Before introducing more than 3 targeted nutraceuticals, the client must meet these "Foundational Stability" markers.

- ☐ **Circadian Rhythm:** Sleeping 7+ hours consistently with regular wake/sleep times.
- ☐ **Blood Sugar Stability:** Significant reduction in "hangry" episodes or afternoon energy crashes.
- ☐ **Dietary Triggers:** Successful removal of primary inflammatory triggers (e.g., gluten/dairy) for at least 21 days.
- ☐ **Gut Baseline:** Absence of severe acute bloating or diarrhea (Gut-First Principle).

Current Status: ☐ STABLE (Proceed to Target) ☐ UNSTABLE (Remain in Optimize)

Section 2: Phase 2 – Drainage Audit (The "Pipes" Check)

Before initiating any Phase I or Phase II Liver Detoxification, ensure the "pipes" are open to prevent metabolic backlog.

Drainage Pathway	Readiness Marker	Status
The Colon	1–2 complete, easy-to-pass bowel movements daily.	<input type="checkbox"/> Yes <input type="checkbox"/> No
Kidneys/Liver	Consuming at least 2L of water daily; bile flow support (bitters/fats) tolerated.	<input type="checkbox"/> Yes <input type="checkbox"/> No
Lymph/Skin	Daily movement or weekly sweating (sauna/exercise) occurring.	<input type="checkbox"/> Yes <input type="checkbox"/> No

Stop Sign: If any "No" is checked, **do not** start detox supplements. Focus on hydration and motility first.

Section 3: Phase 3 – The Endocrine Hierarchy

Prioritize interventions from the bottom up. Do not address a higher level until the lower level is stabilized.

Priority Level	Focus Area	Assessment Questions
Level 1 (Base)	Blood Sugar/Insulin	Is the client eating protein-pacing meals? Is insulin resistance being addressed?
Level 2	Adrenals (HPA Axis)	Are stress management tools in place? Is the client "wired but tired"?
Level 3	Thyroid (HPT Axis)	Is the metabolic thermostat supported <i>after</i> blood sugar is stable?
Level 4 (Top)	Sex Hormones	Are we avoiding "hormone chasing" until Levels 1-2 are solid?

Section 4: Clinical Decision & Reflection

Total Readiness Score: _ / 10 (Total checkboxes marked "Yes")

Practitioner Observations:

The "Kitchen Sink" Check: Are you introducing more than 5 new interventions at once? ☐ Yes ☐ No (*If Yes, simplify to reduce "biological noise."*)

Next Strategic Steps:

- ☐ **Stay in Optimize Phase:** Focus on: _____
 - ☐ **Move to Target Phase:** Introduce: _____
 - ☐ **Open Drainage:** Focus on: _____
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