

The Cold Case "Post-Mortem" Audit & Clinical Logic Worksheet

Lead Practitioner/Mentor: __ Mentee: __ Case ID/Client Initials: __ Date of Review: _____

Section 1: The "Anchoring Bias" Check

Review the initial intake. Did we focus too heavily on the first symptom reported?

1. Initial "Anchor" Symptom: _____
2. Was this the actual Root Cause? ☐ Yes ☐ No ☐ Uncertain
3. The "Missing" 20-Year Chronology: What event or trigger was overlooked in the initial timeline?

Section 2: Clinical Logic Audit

Evaluate the case using the three-phase logic audit to identify clinical blindspots.

Audit Category	Critical Question	Finding/Observation
Timeline Audit	Did we miss a trigger 6 months <i>before</i> symptoms?	
Mediator Audit	Is there a hidden mediator (stress/toxic environment)?	
Matrix Audit	Which node (e.g., Energy, Defense) did we ignore?	

Section 3: The R.O.O.T.S.™ Complexity Collapse

For clients with 5+ diagnoses, identify the "Shared Root" to reduce protocol fatigue.

List Primary Diagnoses: _____

The Leverage Point Identification: *If we could only change ONE thing in this client's life that would impact three or more of their symptoms, what would it be?*

Target Intervention: _____

Section 4: The "Translator" Strategy

Prepare for inter-professional communication. Convert functional findings into conventional medical language for the client's specialist.

Functional Finding	Conventional "Translator" Term	Clinical Goal for Specialist
<input type="checkbox"/> Dysbiosis	Alteration in Gut Microbiota	Reduce systemic endotoxemia
<input type="checkbox"/> HPA Axis Dysregulation	Neuroendocrine Stress Response	Cortisol/Hormonal management
<input type="checkbox"/> Mitochondrial Dysfunction	Cellular Bioenergetic Impairment	ATP Optimization
<input type="checkbox"/> Leaky Gut	Intestinal Permeability	Reduce inflammatory markers

Section 5: Reflection & Mentorship Feedback

Mentee Self-Score (Confidence in this case 1-10): _

Mentor's Socratic Observation: *(Instead of giving the answer, record the question asked to prompt the mentee's logic)* "Given the history of _____, what environmental triggers haven't we ruled out yet?"

New Clinical Pearl Learned:

Next Steps for the Case:

- ☐ Update Timeline with missed triggers.
- ☐ Pivot protocol to the "Shared Root" node.
- ☐ Draft communication to specialist using "Translator" terms.

- [] Schedule follow-up review in 30 days.

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