

The Root-Cause Insight Assessment (HVLM Tool)

Client Name: _____ Date: _____

Instructions: This tool is designed to help you move beyond surface-level symptoms and identify the "invisible" connections in your health. Complete each section honestly to see if your symptoms are isolated issues or part of a larger systemic pattern.

Section 1: The Symptom Inventory (The "Reveal" Phase)

Check all that apply to you within the last 30 days.

The "Tired & Wired" Cluster (Adrenal/Hormone) - ☐ Fatigue that isn't resolved by sleep - ☐
☐ Energy crash around 3:00 PM - ☐ Difficulty falling or staying asleep - ☐ Frequent cravings for salt or sugar

The "Brain & Belly" Cluster (Gut-Brain Axis) - ☐ Frequent bloating or gas after meals - ☐
Brain fog or difficulty concentrating - ☐ Feeling anxious or "on edge" without a clear cause - ☐
☐ Irregular bowel movements (constipation or urgency)

The "Inflammation" Cluster (Immune/Systemic) - ☐ Aching joints or general muscle stiffness - ☐
☐ Skin flares (rashes, acne, or dryness) - ☐ Frequent "seasonal" sensitivities or congestion - ☐ Sensitivity to bright lights or loud noises

Section 2: Connecting the Dots (The "Organize" Phase)

Functional Medicine looks at the **Matrix**—how your systems interact. Use the table below to track the frequency and triggers of your top 3 concerns.

Symptom	Frequency (Daily/Weekly)	Potential Trigger (Food, Stress, Sleep)
1.		
2.		
3.		

Section 3: Reflection & Scoring

Scoring Your Total Checks from Section 1: * **1-3 Checks:** *Baseline Awareness.* Your foundations may need minor adjustments. * **4-7 Checks:** *Systemic Imbalance.* Your symptoms are likely interconnected across the Matrix. * **8+ Checks:** *High Priority.* Your body is sending loud signals that require a root-cause investigation.

Observations & "Moment of Insight": What is the one thing your body might be trying to tell you through these symptoms?

Next Steps: Reclaiming Your Vitality

Your symptoms are not "just aging" or "normal." They are the branches of a deeper root-cause issue.

Your Action Plan: 1. [] **Review your Clinical Timeline:** When did these symptoms first begin? 2. [] **Book Your Discovery Call:** Let's move to the **Optimize** phase. During this 20-minute call, we will map your symptoms to the Functional Medicine Matrix and discuss a personalized path forward.

Schedule here: _____

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