

Collaborative Care & SBAR Communication Tool

Client Name: _____ Date: ____ Primary Care Physician/Specialist: _____

Section 1: Clinical Landscape & Polypharmacy Map

List current conventional medications and identify potential nutrient depletions to discuss with the prescribing physician.

Medication Name	Purpose	Potential Depletion (Check if applicable)	Functional Impact to Monitor
		<input type="checkbox"/> Statins: CoQ10	Muscle pain, fatigue, mitochondrial health
		<input type="checkbox"/> Metformin: Vitamin B12	Neuropathy, macrocytic anemia, energy
		<input type="checkbox"/> PPIs: Mg, B12, Calcium	Bone density, digestion, mineral status
		<input type="checkbox"/> Oral Contracept.: B-Vits, Zn	Mood, metabolic function, oxidative stress
		<input type="checkbox"/> Other: _____	

Section 2: The SBAR Communication Planner

Use this framework to structure professional outreach to the client's medical team (via letter, email, or phone).

- **S (Situation):** Concise statement of why you are contacting them.
 - Example: "I am working with [Client Name] regarding their metabolic health and noted a potential nutrient-drug interaction."

-

- **B (Background):** Pertinent clinical history or objective data.
 - Example: "Client has been on 1000mg Metformin for 2 years; recent functional testing shows B12 levels at the low end of the reference range."

-

- **A (Assessment):** Your professional interpretation of the physiological mechanism.
 - *Example: "Current symptoms of peripheral neuropathy may correlate with sub-clinical B12 depletion secondary to long-term Metformin use."*
 - _____
- **R (Recommendation):** Your suggested action or request for collaboration.
 - *Example: "I recommend a serum Methylmalonic Acid (MMA) test to confirm status before we initiate high-dose supplementation."*
 - _____

Section 3: Client Advocacy & "Talking Points"

Empower the client to navigate their next conventional appointment using the Expert-Partner dynamic.

- **Objective Evidence:** Provide the client with 1–2 peer-reviewed citations or lab markers to show their doctor.
- **The Script:** "I'd like to talk to my doctor about _____ *because I am concerned about* _____."
- **Conflict Bridge:** If the doctor is skeptical of functional tests, the client should say: "We are using this tool to look for sub-clinical patterns to support the lifestyle changes we are making."

Section 4: Reflection & Outcome Tracking

Collaboration Goal: ☐ Referral Established ☐ Lab Work Ordered ☐ Med Adjustment (by MD)

Observations/Follow-up Needed:

Next Session Strategy:

AccrediPro Standards Institute Certified Tool
