

# Functional Medicine Safety & Progress Tracker (The R.O.O.T.S. Quality Check)

Client Name: \_\_\_\_\_ Date: \_ Phase: ☐ Reveal ☐ Target ☐ Sustain

## Section 1: Outcome Tracking (PROM Scorecard)

*Use this section to quantify progress using the Medical Symptoms Questionnaire (MSQ) or similar validated tools.*

| System Focus                        | Baseline Score | Current Score | Change (+/-) |
|-------------------------------------|----------------|---------------|--------------|
| <b>Digestive</b> (Bloating, Bowels) |                |               |              |
| <b>Energy/Mitochondrial</b> (FSS)   |                |               |              |
| <b>Mood/Cognition</b> (PHQ/GAD)     |                |               |              |
| <b>Total MSQ Load</b>               |                |               |              |

**Practitioner Note:** A decrease in score indicates successful intervention ROI. If scores stagnate, review the *Target* phase protocols.

## Section 2: Adverse Event & "Healing Crisis" Log

*To be completed if the client is starting a new antimicrobial, detox, or intensive supplement protocol.*

**Has the client experienced any of the following in the last 7 days?** - ☐ **Digestive Distress:** New bloating, diarrhea, or significant constipation. - ☐ **Neurological Shifts:** Increased "brain fog," irritability, or new headaches. - ☐ **Skin/Allergic:** New rashes, hives, or itching. - ☐ **Flu-like Symptoms:** Low-grade fever or muscle aches (potential Herxheimer).

**Reaction Severity:** ☐ Mild (Manageable) ☐ Moderate (Interfering) ☐ Severe (Stop Protocol)

**Action Taken (based on Reaction Protocol):**

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## Section 3: Clinical Safety & Red Flag Review

*Practitioner MUST verify these safety markers before proceeding with wellness recommendations.*

- ☐ **Lab Safety Check:** Review most recent labs for "Red Flags" (Hgb <8.0, Glucose >126, TSH >10 or <0.1, ALT/AST >3x normal).
- ☐ **Referral Status:** If Red Flags were present, has the client seen their PCP? ☐ Yes ☐ No
- ☐ **Data Privacy:** Are all session notes and labs stored in a HIPAA/GDPR compliant portal with a BAA? ☐ Yes
- ☐ **Telehealth Safety:** Client's current physical location confirmed? ☐ Yes

## Section 4: Practitioner Reflection & CQI

**Clinical Audit Questions:** 1. Is the client's progress matching the predicted timeline for the R.O.O.T.S. Method™?

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1. What is the primary barrier to adherence this week (e.g., tech, symptoms, cost)?

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**Next Steps / Protocol Adjustments:** - ☐ Continue current protocol - ☐ Implement "Reaction Protocol" (Hydration/Binders/Pause) - ☐ Formal Medical Referral Required - ☐ Schedule Quarterly Clinical Audit for this file

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*AccrediPro Standards Institute Certified Tool | Quality Assurance & Patient Safety Protocol*

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