

# Protocol Optimization & Implementation Worksheet

Practitioner Name: \_\_ Client Name: \_\_ Date: \_\_

## Section 1: The Optimization Hierarchy (The Foundation)

*Before prescribing supplements (Target), ensure the lifestyle foundation (Optimize) is stable. Use the "Audit Question" to verify.*

**The Audit Question:** If we removed all supplements today, what lifestyle habits would remain to support this client's health?

Priority Lifestyle Interventions (The "Optimize" Rule of Three): 1. \_\_\_\_\_ 2. \_\_\_\_\_ 3. \_\_\_\_\_

## Section 2: The Targeted Protocol (Safety & Specificity)

*Apply the "Rule of Three" for supplements to avoid protocol fatigue and ensure safety.*

Supplement Name	Purpose (Matrix Node)	Dose/Form	Safety Check (Interactions?)
1.			[ ] Checked CYP450
2.			[ ] Checked Redundancy
3.			[ ] Bioavailability OK

**Redundancy Check:** Are there overlapping ingredients (e.g., Zinc in multiple formulas)? [ ]

Yes [ ] No **Exit Strategy:** What is the intended duration for these "Target" supplements?

## Section 3: Troubleshooting Clinical Plateaus

*If the client is not responding despite 100% compliance, audit for "Hidden Blockers."*

**Check for the following:** - [ ] **Total Toxic Burden:** Is there evidence of mold, heavy metals, or environmental toxins? - [ ] **Limbic System:** Does the client feel safe? Is there chronic "threat" or emotional stress? - [ ] **Stealth Infections:** Could there be underlying viral loads (EBV) or tick-borne issues? - [ ] **Allostatic Load:** Is the current protocol adding more stress than the client can handle?

## Section 4: Fatigue & Compliance Reflection

Client Overwhelm Score (1-10): \_\_\_\_ (1 = Calm, 10 = Paralysis)

**Practitioner Reflection:** - Is the protocol "titrated" to the client's current capacity? ☐ Yes ☐

No - Does the client have a clear "Win" they can achieve in the next 7 days? ☐ Yes ☐ No -

**Action to reduce fatigue:** \_\_\_\_\_

### Next Steps / Supervisory Notes:

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*AccrediPro Standards Institute Certified Tool | R.O.O.T.S. Method™ Application*

### Instructions for the Practitioner:

1. **Optimize First:** Do not move to "Target" supplements until the client has committed to the three "Optimize" lifestyle tasks.
2. **The Rule of Three:** Limit your recommendations to 3 lifestyle changes and 3 supplements per phase to ensure 90%+ compliance.
3. **Safety First:** Always cross-reference the CYP450 system if the client is on pharmaceutical medications.
4. **Empowerment:** Use this worksheet during supervision to identify where the "bottleneck" in client progress is occurring.