

# FUNCTIONAL WELLNESS SCOPE & SAFETY WORKSHEET

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

## Section 1: Terminology & Scope Audit

*Use this checklist during or immediately after the session to ensure all communication remains within the Functional Wellness Scope rather than Medical Practice.*

- [ ] **Reframe Applied:** Did I avoid "treating" or "diagnosing" a specific disease?
- [ ] **Language Check:** Used terms like "optimize," "support," "imbalance," or "root-cause" instead of "cure," "treat," or "prescribe."
- [ ] **Informed Consent:** Has the client signed the latest Informed Consent/Disclaimer for this session?
- [ ] **Medication Boundary:** Confirmed that I did **not** advise the client to alter or stop any prescription medications.
- [ ] **Educational Focus:** Clearly stated that this session is for *educational and wellness purposes only*.

## Section 2: The 'Reveal' Phase (Functional Lab Review)

*If reviewing labs (GI-Map, DUTCH, OAT, etc.), complete this section to ensure regulatory compliance.*

Compliance Item	Status	Notes/Actions
Lab Disclaimer Provided	<input type="checkbox"/>	(Explicitly stated results are not for diagnosis)
Functional Interpretation	<input type="checkbox"/>	(Focused on biomarkers of function, not disease)
DTC Law Compliance	<input type="checkbox"/>	(Verified lab ordering is legal in client's state)
PCP Collaboration	<input type="checkbox"/>	(Client encouraged to share results with physician)

## Section 3: Red Flag & Referral Tracker

*Legal safety requires documenting the identification of "Red Flags" and subsequent referrals.*

Potential Red Flag Observed	Referral Made?	Professional Referred To
Unexplained Weight Loss	<input type="checkbox"/>	
Severe/Localized Pain	<input type="checkbox"/>	
Mental Health Crisis/Risk	<input type="checkbox"/>	
Other: _____	<input type="checkbox"/>	

## Section 4: R.O.O.T.S. Method™ Documentation Summary

*Reflect on the session documentation to ensure professional due diligence.*

**R (Reveal):** Data sources documented (Labs/Intake)? [ ] Yes **O (Organize):** Matrix mapping used to show systems-based approach? [ ] Yes **O (Optimize):** Foundational lifestyle changes prioritized? [ ] Yes **T (Target):** Clinical rationale for each supplement recorded? [ ] Yes **S (Sustain):** Client self-efficacy and progress monitoring noted? [ ] Yes

### Practitioner Observations & Risk Mitigation:

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### Next Steps for Practitioner:

- [ ] Update Private Member Association (PMA) records (if applicable).
  - [ ] Send follow-up email with "Educational Health Consulting" disclaimer.
  - [ ] File lab interpretation with signed disclaimer attached.
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*AccrediPro Standards Institute Certified Tool | Scope of Practice Compliance Framework*

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