

# Complex Case Synthesis & Phase Tracker

Practitioner Name: \_\_\_\_

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

## Section 1: The "Lead Domino" Assessment

*Identify which systems are driving the multi-system dysregulation based on clinical reasoning.*

**Primary Dysregulation Nodes (Check all that apply):** - ☐ **HPA Axis:** "Wired but tired," sleep issues, circadian rhythm disruption. - ☐ **Metabolic-Immune:** HbA1c > 5.4%, joint pain, systemic inflammation. - ☐ **The PPI Legacy:** History of acid blockers, low Ferritin (<30), low B12. - ☐ **Conversion Gap:** Low Free T3 despite T4 medication, gut/liver congestion. - ☐ **Gut Permeability:** Chronic bloating, food sensitivities, high TPO antibodies.

## Section 2: 3-Phase Clinical Protocol Tracker

*Track the implementation of the phased intervention plan.*

Phase	Focus Area	Action Items	Status
<b>Phase 1: Reveal &amp; Remove</b>	Inflammation & Blood Sugar	- Anti-inflammatory Diet (AIP/Paleo) - Protein-first breakfast - Morning sunlight (10 mins)	<input type="checkbox"/>
<b>Phase 2: Rebuild &amp; Rebalance</b>	Nutrients & Gut	- Iron/D3/K2 Supplementation - GI Support (Glutamine/Zinc) - Selenium for T4-to-T3 support	<input type="checkbox"/>
<b>Phase 3: Sustain &amp; Support</b>	Resilience & Flexibility	- Metabolic reintroductions - HPA Adaptogens (Ashwagandha) - Monthly maintenance plan	<input type="checkbox"/>

## Section 3: Symptom & Marker Progress

Rate symptoms on a scale of 1-10 (10 being most severe).

Symptom / Marker	Initial Value	Month 1	Month 3	Month 6
Crushing Fatigue				
Brain Fog				
Joint Pain				
Digestive Bloating				
<b>Ferritin Level</b>				
<b>HbA1c %</b>				

## Section 4: Scope & Referral Checklist

Monitor for "Red Flags" requiring immediate medical collaboration. - ☐ **Rapid Heart Rate:**

Resting HR > 100 bpm (Refer for possible Thyroid Storm). - ☐ **Severe Anemia:**

Hemoglobin/Hematocrit dropping below range (Refer for infusion). - ☐ **Mental Health:**

Suicidal ideation or deep clinical depression (Refer for therapy/psych). - ☐ **Referral Letter**

**Sent:** Date: \_\_\_\_ To: \_\_\_\_\_ (MD)

## Section 5: Practitioner Reflection

**Lead Domino Identified:** \_\_\_\_\_

**Clinical Wins (Successes this month):**

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**Adjustments Needed:**

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## Next Steps:

- ☐ Review labs for T4-to-T3 conversion efficiency.
  - ☐ Schedule Phase transition deep-dive session.
  - ☐ Discuss "Monthly Maintenance" membership (Transition at Month 4).
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*AccrediPro Standards Institute Certified Tool - Clinical Practice Lab: Level 2 Integration*

