

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:

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.

AccrediPro Standards Institute Certified Tool | Scope of Practice Compliance Framework
