

Complex Case "Linchpin" & Order of Operations Worksheet

Client Name: _____ Date: _____

Section 1: Identifying the "Healing Ceiling"

Use this section to identify factors blocking the client's ability to respond to supplements or lifestyle changes.

Current Medications & Nutrient Depleters: - [] **PPIs/Antacids:** (Check for B12, Iron, Magnesium, and Thyroid med malabsorption) - [] **SSRIs:** (Check for gut-brain axis interference or nutrient depletion) - [] **NSAIDs:** (Check for intestinal permeability/gut lining issues) - [] **Other:** _____

Environmental/Biotic Stressors: - [] **Mold/Moisture:** (History of leaks, humid climate, musty smells) - [] **Internal Vibrations:** (Sign of neuro-inflammation/biotoxicity) - [] **Migratory Pain:** (Sign of systemic immune dysregulation)

Section 2: The "Linchpin" Analysis

Review the symptoms and rank the primary driver (The Linchpin) that is stalling the case.

Priority	System/Linchpin	Evidence (Symptoms/Labs)
High	Absorption Barrier	(e.g., Low Ferritin <30, Low B12, PPI use, GERD)
High	Environmental Load	(e.g., Mold exposure, "internal vibrations," high TPO)
Med	Gut-Immune Axis	(e.g., SIBO symptoms, IBS-C, low motility)
Med	HPA Axis	(e.g., "Tired but wired," 1/10 evening energy)

Section 3: 3-Phase Clinical Protocol

Map out the intervention strategy based on the Functional Medicine Order of Operations.

PHASE 1: Foundations & Nutrient Restoration (Weeks 1–4) Goal: Restore absorption and clear the environment. 1. _____ 2. _____ 3. _____

PHASE 2: Gut-Immune Clearing (Weeks 5–12) Goal: Address dysbiosis and systemic inflammation. 1. _____ 2. _____

PHASE 3: Sustain & Resilience (Month 4+) Goal: HPA-axis support and long-term maintenance. 1. _____

Section 4: Clinical Safety & Scope Check

Are any "Red Flags" present? - [] Unexplained Weight Loss (>10% in 3 months) - [] Sudden Neurological Deficits (Vision, Balance, Drooping) - [] Suicidal Ideation or Severe Mental Health Crisis - [] Night Sweats or Unexplained Fever *Note: If any are checked, pause protocol and refer to MD immediately.*

Section 5: The Narrative (Clinical Teaching Point)

The "Why" for the Client: *Explain how the "Cell Danger Response" is affecting their energy and why we must address the "Linchpin" before the symptoms will resolve.*

Next Appointment Date: _____ **Priority Action Item:** _____

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