

# Complex Case Strategy & Readiness Worksheet

Client Name: \_\_ Date: \_\_ Current Phase: (1-4) \_\_

## Section 1: The "Order of Operations" Priority Check

*Use this section to determine if the client is stable enough to progress. Assess which "Fire" needs extinguishing before moving to the "Foundation."*

**Level 1: The Fire (Mast Cell/Inflammation)** - [ ] Presence of hives, rashes, or chemical sensitivities? - [ ] Frequent "unexplained" flares or reactions to most supplements? - [ ] High anxiety/panic or "wired but tired" nervous system state? - [ ] **Action:** If any checked, prioritize **Limbic Retraining & Mast Cell Stabilizers.**

**Level 2: The Flood (Drainage & Elimination)** - [ ] Bowel movements occurring less than 1x daily? - [ ] History of gallbladder issues or light-colored stools (sludgy bile)? - [ ] Swollen lymph nodes or waking up feeling "puffy"? - [ ] **Action:** If any checked, prioritize **Biliary Flow & Lymphatic Support.**

**Level 3: The Foundation (HPA Axis & Nutrients)** - [ ] Extreme fatigue or inability to handle mild stress? - [ ] Documented mineral deficiencies or electrolyte imbalances? - [ ] Poor sleep architecture (waking unrefreshed)? - [ ] **Action:** If any checked, prioritize **Mineral Optimization & HPA Support.**

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## Section 2: Pre-Habilitation Checklist

*Before starting "Target & Eradicate" (Phase 3), the client MUST meet these safety requirements.*

Pre-hab Requirement	Status	Practitioner Notes
<b>Bowel Regularity</b>	<input type="checkbox"/>	Must be 1-2 complete movements daily.
<b>Mineral Status</b>	<input type="checkbox"/>	Optimized Mg, K, and Na levels.
<b>Biliary Flow</b>	<input type="checkbox"/>	No "sludge" symptoms; bile moving freely.
<b>Sleep Quality</b>	<input type="checkbox"/>	Deep sleep achieved for glymphatic drainage.
<b>Nervous System</b>	<input type="checkbox"/>	Daily limbic or vagus nerve practice in place.

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## **Section 3: The "Stalled Case" Pivot (If Progress < 40%)**

*If the client has hit a plateau, screen for these four "Stealth" blockers:*

1. **Environmental Check:** Hidden mold in home/work? EMF exposure? [ ]
  2. **Stealth Check:** Vector-borne illness (Lyme, Bartonella, etc.)? [ ]
  3. **Emotional Check:** Unresolved ACEs or Secondary Gain? [ ]
  4. **Structural Check:** Ileocecal valve or physical obstruction? [ ]
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## **Section 4: Clinical Strategy Reflection**

**Current Clinical Focus:** \_\_\_\_\_

**Primary Barrier to Progress:** \_\_\_\_\_

**Next 30-Day Goal:** \_\_\_\_\_

**Alignment Meeting Notes:** (*Is the client aware of the 12-month timeline? Do they feel "safe" in the current protocol?*)  
\_\_\_\_\_  
\_\_\_\_\_

## **Next Steps:**

- [ ] Adjust protocol to address "The Fire" (if applicable)
  - [ ] Initiate Pre-hab minerals/drainage
  - [ ] Schedule "Alignment Meeting" to review the 12-month roadmap
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