

# Functional Medicine Safety & Progress Tracker (The R.O.O.T.S. Quality Check)

Client Name: \_\_\_\_\_ Date: \_\_\_\_\_ Phase: [ ] Reveal [ ] Target [ ] Sustain

## Section 1: Outcome Tracking (PROM Scorecard)

*Use this section to quantify progress using the Medical Symptoms Questionnaire (MSQ) or similar validated tools.*

System Focus	Baseline Score	Current Score	Change (+/-)
Digestive (Bloating, Bowels)			
Energy/Mitochondrial (FSS)			
Mood/Cognition (PHQ/GAD)			
Total MSQ Load			

**Practitioner Note:** A decrease in score indicates successful intervention ROI. If scores stagnate, review the *Target* phase protocols.

## Section 2: Adverse Event & "Healing Crisis" Log

*To be completed if the client is starting a new antimicrobial, detox, or intensive supplement protocol.*

**Has the client experienced any of the following in the last 7 days?** - [ ] **Digestive Distress:** New bloating, diarrhea, or significant constipation. - [ ] **Neurological Shifts:** Increased "brain fog," irritability, or new headaches. - [ ] **Skin/Allergic:** New rashes, hives, or itching. - [ ] **Flu-like Symptoms:** Low-grade fever or muscle aches (potential Herxheimer).

**Reaction Severity:** [ ] Mild (Manageable) [ ] Moderate (Interfering) [ ] Severe (Stop Protocol)

**Action Taken (based on Reaction Protocol):**

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## Section 3: Clinical Safety & Red Flag Review

*Practitioner MUST verify these safety markers before proceeding with wellness recommendations.*

- **Lab Safety Check:** Review most recent labs for "Red Flags" (Hgb <8.0, Glucose >126, TSH >10 or <0.1, ALT/AST >3x normal).
- **Referral Status:** If Red Flags were present, has the client seen their PCP?  Yes  No
- **Data Privacy:** Are all session notes and labs stored in a HIPAA/GDPR compliant portal with a BAA?  Yes
- **Telehealth Safety:** Client's current physical location confirmed?  Yes

## Section 4: Practitioner Reflection & CQI

**Clinical Audit Questions:** 1. Is the client's progress matching the predicted timeline for the R.O.O.T.S. Method™?

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1. What is the primary barrier to adherence this week (e.g., tech, symptoms, cost)?
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**Next Steps / Protocol Adjustments:** -  Continue current protocol -  Implement "Reaction Protocol" (Hydration/Binders/Pause) -  Formal Medical Referral Required -  Schedule Quarterly Clinical Audit for this file

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*AccrediPro Standards Institute Certified Tool | Quality Assurance & Patient Safety Protocol*

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