

# CLINICAL SYNTHESIS & PROTOCOL RATIONALE WORKSHEET

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

## PURPOSE:

Use this worksheet to move beyond a "laundry list" of symptoms and create a unified physiological narrative. This tool helps you define the **Golden Thread** and defend your **Order of Operations** before presenting the plan to your client or a peer-review board.

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## SECTION 1: THE "GOLDEN THREAD" SYNTHESIS

*Identify the core physiological driver that connects the most symptoms (e.g., Gut-Immune Restoration, Mitochondrial Dysfunction, HPA-Axis Dysregulation).*

Primary Physiological Driver: \_\_\_\_\_

**Clinical Narrative (The Story):** How do the Antecedents (genetics/history) and Triggers (events) connect to the current symptoms?

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## SECTION 2: THE MATRIX NODES (Prioritization)

*Identify the top 2 nodes in the Functional Medicine Matrix that require immediate intervention.*

Priority	Matrix Node (e.g., Assimilation, Defense)	Evidence (Lab markers or Symptoms)
1		
2		

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## SECTION 3: PROTOCOL DEFENSE (Mechanism-Based Rationale)

*Justify your interventions. Avoid "Symptom-Based" logic; use "Mechanism-Based" logic.*

Intervention (Supplement/Lifestyle)	Professional Rationale (The "Why" / Biochemical Pathway)
1.	
2.	
3.	
4.	

## SECTION 4: ORDER OF OPERATIONS (Sequencing)

*Functional Medicine requires "Stability before Specificity." Check the boxes to ensure proper sequencing.*

- ☐ **STABILIZE (Optimize Phase):** Have I addressed blood sugar, sleep hygiene, and stress mediators first?
- ☐ **SUPPORT (Sustain Phase):** Are the drainage/detoxification pathways open before intensive intervention?
- ☐ **TARGET (Target Phase):** Is this specific intervention (e.g., heavy metal detox, antimicrobial) appropriate for *now*, or should it wait?

**Rationale for current sequencing:** \_\_\_\_\_

## SECTION 5: PRACTITIONER REFLECTION

**Confidence Score:** (1-10) \_ (How well can I defend this case in 15 minutes?)

**Anticipated Challenges:** - ☐ Client Compliance (Complexity) - ☐ Financial Constraints - ☐ Physiological Herxheimer/Reaction - ☐ Other: \_\_\_\_\_

**Next Steps for the Sustain Phase:**

*AccrediPro Standards Institute Certified Tool R.O.O.T.S. Method™ Logic Applied*