

# Complex Case Synthesis & Phase Tracker

Practitioner Name: \_\_\_\_\_

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

## Section 1: The "Lead Domino" Assessment

*Identify which systems are driving the multi-system dysregulation based on clinical reasoning.*

**Primary Dysregulation Nodes (Check all that apply):** - [ ] **HPA Axis:** "Wired but tired," sleep issues, circadian rhythm disruption. - [ ] **Metabolic-Immune:** HbA1c > 5.4%, joint pain, systemic inflammation. - [ ] **The PPI Legacy:** History of acid blockers, low Ferritin (<30), low B12. - [ ] **Conversion Gap:** Low Free T3 despite T4 medication, gut/liver congestion. - [ ] **Gut Permeability:** Chronic bloating, food sensitivities, high TPO antibodies.

## Section 2: 3-Phase Clinical Protocol Tracker

*Track the implementation of the phased intervention plan.*

Phase	Focus Area	Action Items	Status
Phase 1: Reveal & Remove	Inflammation & Blood Sugar	- Anti-inflammatory Diet (AIP/Paleo) - Protein-first breakfast - Morning sunlight (10 mins)	<input type="checkbox"/>
Phase 2: Rebuild & Rebalance	Nutrients & Gut	- Iron/D3/K2 Supplementation - GI Support (Glutamine/Zinc) - Selenium for T4-to-T3 support	<input type="checkbox"/>
Phase 3: Sustain & Support	Resilience & Flexibility	- Metabolic reintroductions - HPA Adaptogens (Ashwagandha) - Monthly maintenance plan	<input type="checkbox"/>

## Section 3: Symptom & Marker Progress

*Rate symptoms on a scale of 1-10 (10 being most severe).*

Symptom / Marker	Initial Value	Month 1	Month 3	Month 6
Crushing Fatigue				
Brain Fog				
Joint Pain				
Digestive Bloating				
<b>Ferritin Level</b>				
<b>HbA1c %</b>				

## Section 4: Scope & Referral Checklist

*Monitor for "Red Flags" requiring immediate medical collaboration.* - [ ] **Rapid Heart Rate:**

Resting HR > 100 bpm (Refer for possible Thyroid Storm). - [ ] **Severe Anemia:**

Hemoglobin/Hematocrit dropping below range (Refer for infusion). - [ ] **Mental Health:**

Suicidal ideation or deep clinical depression (Refer for therapy/psych). - [ ] **Referral Letter**

**Sent:** Date: \_\_\_\_\_ To: \_\_\_\_\_ (MD)

## Section 5: Practitioner Reflection

**Lead Domino Identified:** \_\_\_\_\_

**Clinical Wins (Successes this month):** \_\_\_\_\_

**Adjustments Needed:** \_\_\_\_\_

## Next Steps:

- [ ] Review labs for T4-to-T3 conversion efficiency.
- [ ] Schedule Phase transition deep-dive session.
- [ ] Discuss "Monthly Maintenance" membership (Transition at Month 4).

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