

The Cold Case "Post-Mortem" Audit & Clinical Logic Worksheet

Lead Practitioner/Mentor: ___ Mentee: ___ Case ID/Client Initials: ___ Date of Review:

Section 1: The "Anchoring Bias" Check

Review the initial intake. Did we focus too heavily on the first symptom reported?

1. Initial "Anchor" Symptom: _____
 2. Was this the actual Root Cause? [] Yes [] No [] Uncertain
 3. The "Missing" 20-Year Chronology: What event or trigger was overlooked in the initial timeline?
-

Section 2: Clinical Logic Audit

Evaluate the case using the three-phase logic audit to identify clinical blindspots.

Audit Category	Critical Question	Finding/Observation
Timeline Audit	Did we miss a trigger 6 months <i>before</i> symptoms?	
Mediator Audit	Is there a hidden mediator (stress/toxic environment)?	
Matrix Audit	Which node (e.g., Energy, Defense) did we ignore?	

Section 3: The R.O.O.T.S.TM Complexity Collapse

For clients with 5+ diagnoses, identify the "Shared Root" to reduce protocol fatigue.

List Primary Diagnoses: _____

The Leverage Point Identification: If we could only change ONE thing in this client's life that would impact three or more of their symptoms, what would it be?

Target Intervention: _____

Section 4: The "Translator" Strategy

Prepare for inter-professional communication. Convert functional findings into conventional medical language for the client's specialist.

Functional Finding	Conventional "Translator" Term	Clinical Goal for Specialist
[] Dysbiosis	Alteration in Gut Microbiota	Reduce systemic endotoxemia
[] HPA Axis Dysregulation	Neuroendocrine Stress Response	Cortisol/Hormonal management
[] Mitochondrial Dysfunction	Cellular Bioenergetic Impairment	ATP Optimization
[] Leaky Gut	Intestinal Permeability	Reduce inflammatory markers

Section 5: Reflection & Mentorship Feedback

Mentee Self-Score (Confidence in this case 1-10): _

Mentor's Socratic Observation: (Instead of giving the answer, record the question asked to prompt the mentee's logic) "Given the history of _____, what environmental triggers haven't we ruled out yet?"

New Clinical Pearl Learned:

Next Steps for the Case:

- [] Update Timeline with missed triggers.
- [] Pivot protocol to the "Shared Root" node.
- [] Draft communication to specialist using "Translator" terms.

- [] Schedule follow-up review in 30 days.
-

AccrediPro Standards Institute Certified Tool | Advanced Case Review Mastery

AccrediPro Standards Institute Verified | Confidential Client Resource