

# 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.

---

## 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?

---

---

## 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		

---

## 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*

---