

# Clinical Priority & Intervention Roadmap

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

## Section 1: Identifying the Primary Driver (The "Why" Test)

*Use this section to distinguish between a Primary Driver (the root cause) and a Secondary Dysfunction (the consequence).*

**Top Presenting Symptom:** \_\_\_\_\_

1. **Why?** (Immediate cause): \_\_\_\_\_
2. **Why?** (Underlying imbalance): \_\_\_\_\_
3. **Why?** (Primary Matrix Node): \_\_\_\_\_

**Primary Driver Node Identified:** ☐ Nervous System/HPA ☐ Assimilation (Gut) ☐ Biotransformation (Detox)  
☐ Energy (Mitochondria) ☐ Communication (Hormones) ☐ Defense & Repair (Immune)

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## Section 2: The "Low-Hanging Fruit" (14-Day Quick Wins)

*Identify 1-2 simple interventions to build client self-efficacy and provide rapid relief.*

Strategy	Action Step	Goal/Target
Hydration	<input type="checkbox"/> Drink _ L of water daily	Reduce headaches/brain fog
Magnesium	<input type="checkbox"/> Take _ mg before bed	Improve sleep/muscle tension
Light Hygiene	<input type="checkbox"/> Blue light blockers after 8 PM	Improve melatonin onset
Blood Sugar	<input type="checkbox"/> _ g protein at breakfast	Eliminate afternoon energy crash
Other	<input type="checkbox"/> _____	_____

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## Section 3: Clinical Rank-Order Strategy

*Rank the client's needs based on the Functional Medicine Hierarchy. Do not move to a lower level until the level above is stabilized.*

Priority Level	Focus Area	Current Status / Planned Intervention
<b>1. Safety &amp; Stability</b>	Remove Upstream Triggers (Toxins, Inflammatory Foods, Stressors)	_____
<b>2. Master Controller</b>	Nervous System & HPA Axis (The "OS")	_____
<b>3. The Gatekeeper</b>	Assimilation & Gut Health (Nutrient Absorption)	_____
<b>4. The Engine</b>	Energy (Mitochondria) & Biotransformation (Detox)	_____
<b>5. The Messengers</b>	Communication (Hormones & Neurotransmitters)	_____

## Section 4: Upstream vs. Downstream Audit

*Ensure you aren't "pouring water into a bucket with a hole in it."*

- **Upstream Trigger (The "Reveal"):** \_\_\_\_\_
- **Downstream Imbalance (The "Organize"):** \_\_\_\_\_
- **Is the Upstream Trigger addressed?** ☐ Yes ☐ No (If no, pause downstream supplements)

## Practitioner Observations & Strategy Reflection:

Current "Supplement Graveyard" items to discontinue: \_\_\_\_\_

Why this order was chosen for this specific client:

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## Next Steps:

- **Focus for next 14 days:** \_\_\_\_\_
- **Next appointment date:** \_\_\_\_\_

