

Autoimmune Pathogenesis & R.O.O.T.S. Strategy Worksheet

Client Name: _____ Date: _____

Purpose: This tool is designed to identify the "Triad of Pathogenesis" driving your symptoms and to map out a personalized strategy to dampen auto-aggressive immune responses using the R.O.O.T.S. Method™.

Section 1: The Triad Assessment (Identifying the "Stool")

For an autoimmune response to persist, three factors must be present. Check all that apply.

1. Genetic Predisposition (The "Wood")

- [] Family history of autoimmune disease (Thyroid, RA, Lupus, Celiac, etc.)
- [] Known HLA gene variants (if tested)
- [] Personal history of other "allergic" or "atopic" conditions (Asthma, Eczema)

2. Environmental Triggers (The "Match")

- [] **Infections:** History of EBV (Mono), Lyme, Giardia, or chronic sinus/dental infections.
- [] **Toxins:** Known exposure to mold (mycotoxins), heavy metals (mercury/lead), or pesticides.
- [] **Dietary Proteins:** Frequent consumption of gluten, dairy, or lectins.
- [] **Stress:** High-stress events immediately preceding symptom onset.

3. Intestinal Permeability (The "Wind")

- [] Frequent bloating, gas, or "leaky gut" symptoms.
 - [] Multiple food sensitivities.
 - [] History of NSAID use (Ibuprofen/Aspirin) or frequent antibiotic use.
 - [] Lab markers: Elevated Zonulin or Actomyosin antibodies (if available).
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Section 2: Staging Your Immune Reactivity

Based on your current labs and symptoms, which stage best describes your status?

Stage	Description	Check One
Stage 1: Silent	Positive antibodies present; NO symptoms; NO tissue damage.	[]
Stage 2: Reactivity	Positive antibodies + symptoms (fatigue, pain); NO permanent damage.	[]
Stage 3: Disease	Positive antibodies + symptoms + measurable tissue/organ destruction.	[]

Section 3: The R.O.O.T.S. Strategy Plan

Work with your practitioner to define 1–2 priority actions for each phase.

- **REVEAL (Identify Triggers):**

- Action: _____

- **ORGANIZE (Map to Matrix):**

- Primary Node to address (e.g., Defense & Repair): _____

- **OPTIMIZE (Seal the Gut):**

- Support (Glutamine, Zinc Carnosine, Aloe): _____

- **TARGET (Calm the Storm):**

- Immunomodulators (Vitamin D, Omega-3, Glutathione): _____

- **SUSTAIN (Build Resilience):**

- Lifestyle (Sleep, Stress, Circadian Rhythm): _____

Section 4: Reflection & Observations

What is the "Primary Trigger" we are prioritizing this month?

Client Notes on Progress (Energy, Stiffness, Brain Fog):

Next Steps:

- [] Schedule follow-up for predictive antibody re-testing (Date: _____)

- [] Begin "Seal and Send" gut protocol.
 - [] Transition to [Gluten-Free / Paleo / AIP] dietary template.
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