

Complex Case Strategy & Readiness Worksheet

Client Name: __ Date: __ Current Phase: (1-4) __

Section 1: The "Order of Operations" Priority Check

Use this section to determine if the client is stable enough to progress. Assess which "Fire" needs extinguishing before moving to the "Foundation."

Level 1: The Fire (Mast Cell/Inflammation) - ☐ Presence of hives, rashes, or chemical sensitivities? - ☐ Frequent "unexplained" flares or reactions to most supplements? - ☐ High anxiety/panic or "wired but tired" nervous system state? - ☐ *Action:* If any checked, prioritize **Limbic Retraining & Mast Cell Stabilizers**.

Level 2: The Flood (Drainage & Elimination) - ☐ Bowel movements occurring less than 1x daily? - ☐ History of gallbladder issues or light-colored stools (sludgy bile)? - ☐ Swollen lymph nodes or waking up feeling "puffy"? - ☐ *Action:* If any checked, prioritize **Biliary Flow & Lymphatic Support**.

Level 3: The Foundation (HPA Axis & Nutrients) - ☐ Extreme fatigue or inability to handle mild stress? - ☐ Documented mineral deficiencies or electrolyte imbalances? - ☐ Poor sleep architecture (waking unrefreshed)? - ☐ *Action:* If any checked, prioritize **Mineral Optimization & HPA Support**.

Section 2: Pre-Habilitation Checklist

Before starting "Target & Eradicate" (Phase 3), the client MUST meet these safety requirements.

Pre-hab Requirement	Status	Practitioner Notes
Bowel Regularity	<input type="checkbox"/>	Must be 1-2 complete movements daily.
Mineral Status	<input type="checkbox"/>	Optimized Mg, K, and Na levels.
Biliary Flow	<input type="checkbox"/>	No "sludge" symptoms; bile moving freely.
Sleep Quality	<input type="checkbox"/>	Deep sleep achieved for lymphatic drainage.
Nervous System	<input type="checkbox"/>	Daily limbic or vagus nerve practice in place.

Section 3: The "Stalled Case" Pivot (If Progress < 40%)

If the client has hit a plateau, screen for these four "Stealth" blockers:

1. **Environmental Check:** Hidden mold in home/work? EMF exposure? []
 2. **Stealth Check:** Vector-borne illness (Lyme, Bartonella, etc.)? []
 3. **Emotional Check:** Unresolved ACEs or Secondary Gain? []
 4. **Structural Check:** Ileocecal valve or physical obstruction? []
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Section 4: Clinical Strategy Reflection

Current Clinical Focus: _____

Primary Barrier to Progress: _____

Next 30-Day Goal: _____

Alignment Meeting Notes: *(Is the client aware of the 12-month timeline? Do they feel "safe" in the current protocol?)*

Next Steps:

- [] Adjust protocol to address "The Fire" (if applicable)
 - [] Initiate Pre-hab minerals/drainage
 - [] Schedule "Alignment Meeting" to review the 12-month roadmap
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