

# COLLABORATIVE CARE & SCOPE ALIGNMENT

## WORKSHEET

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

Primary Care Physician/Specialist: \_\_\_\_\_

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### Section 1: Clinical Language & Scope Check

*Review your plan before communicating with the client or their MD. Ensure all language reflects "Optimization" rather than "Treatment."*

- [ ] **Language Audit:** Have I replaced medical terms (Cure/Treat/Diagnose) with functional terms (Support/Optimize/Modulate)?
  - [ ] **Functional Goal:** What is the primary foundational goal? (e.g., *Optimizing gut-thyroid axis via phytonutrient density*)  
○ \_\_\_\_\_
  - [ ] **Clinical Rationale:** (e.g., *Supporting HPA-Axis dysregulation based on client's reported cortisol rhythm and fatigue markers.*)  
○ \_\_\_\_\_
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### Section 2: Collaborative Physician Strategy (The Three-Part Letter)

*Use this section to draft the professional summary to be sent to the client's MD.*

Component	Practitioner Notes / Draft
1. Professional Intro	I am working with [Client Name] as a Functional Health Coach focusing on lifestyle and nutritional foundations.
2. Functional Goals	My focus is on: _____
3. Monitoring Request	I request medical monitoring for: (e.g., TSH/T4 every 6 weeks, fasting glucose) _____

Evidence Bundle Attached? - [ ] Study 1 Title: \_\_\_\_\_ - [ ] Study 2 Title: \_\_\_\_\_

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## Section 3: Advanced Informed Consent (PARQ Model)

Complete this checklist with the client during the protocol presentation to ensure ethical leadership.

- **P - Procedure:** Client understands the nutritional/supplemental protocol.
  - **A - Alternatives:** Client is aware of conventional medical alternatives for their condition.
  - **R - Risks:** Potential "Herxheimer" or side effects discussed (e.g., GI upset, detox symptoms).
  - **Q - Questions:** Client has been given time to ask questions and feels confident in the plan.
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## Section 4: Risk Management & Red Flag Protocol

Identify when to trigger an immediate referral loop.

**Immediate MD Referral Required if Client Experiences:** 1. Sudden, unexplained weight loss (>10lbs in a month). 2. Localized, severe, or worsening pain. 3. Neurological changes (numbness, sudden vision changes). 4. Any symptom outside the "Functional Optimization" scope.

**Referral Tracking:** -  MD Referral Sent? (Date: \_\_)  
-  Follow-up Received? (Date: \_\_)

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## Reflection & Outcome

**Practitioner Observations:** (How did the MD respond to the collaborative approach? Is the client's medical team aligned?)

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**Next Steps for Collaborative Loop:** -  Send clinical summary to MD. -  Schedule follow-up lab review with client. -  Update SOAP notes with clinical rationale for all supplements.

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