CLIENT COLLABORATIVE CARE & PROGRESS SUMMARY

Client Name: _____ Date: ___ Referring Provider/Partner: _____ (e.g., MD, DC, Pharmacist) Primary Health Goal: _____

Section 1: The Care Team Mapping

To be completed during the initial Discovery or Reveal phase to identify "Health Hub" connection points.

- [ ] **Primary Care Physician (PCP):** _____

- [ ] **Specialist (Endo/GI/etc):** _____

- [ ] **Bodywork/Structural (DC/PT/MT):** _____

- [ ] **Pharmacy/Supplements:** _____

- [ ] **Fitness/Movement Hub:** _____

Consent for Collaboration: - [ ] Client has signed a Release of Information (ROI) to share functional summaries with the above providers to close the "Referral Loop."

Section 2: Functional Progress Tracker (The Referral Loop)

Use this section to draft the "Functional Summary" update for the referring provider. Focus on lifestyle interventions that support their clinical goals.

Functional Area	Current Status/Baseline	Objective Improvement
Nutrient Density	_____	_____
Gut Health/Digestion	_____	_____
Sleep/Circadian Rhythm	_____	_____
Stress/HPA-Axis	_____	_____
Movement/Bio-mechanics	_____	_____

The R.O.O.T.S. Method™ Insights for Provider: *(Briefly summarize the functional imbalances identified that complement the medical diagnosis)*

Section 3: Partnership Reciprocity & Reflection

Practitioner use only: To track the health of the strategic partnership.

Referral Loop Status: - [ ] **Acknowledgement sent?** (Handwritten note/email within 24hrs of referral) - [ ] **Progress Update sent?** (Functional Summary shared after "Reveal" phase) - [ ] **Closing the Loop?** (Final results shared upon program completion)

Professional Reciprocity Tracking: *Did this client require a service I can refer back to my partner?* - [ ] Referral made back to MD/DC for: **_____** *- [ ] Referral made to Partner Pharmacy/Gym for: _____*

Observations & Opportunities: *(e.g., Does this case suggest a need for a Joint Venture workshop or "Lunch and Learn" with the referring provider?)*

Next Steps:

1.
2.

AccrediPro Standards Institute Certified Tool Standard: Strategic Partnerships & Referral Ecosystems (Module 31)