

Protocol Optimization & Implementation Worksheet

Practitioner Name: __ Client Name: __ Date: __

Section 1: The Optimization Hierarchy (The Foundation)

Before prescribing supplements (Target), ensure the lifestyle foundation (Optimize) is stable. Use the "Audit Question" to verify.

The Audit Question: If we removed all supplements today, what lifestyle habits would remain to support this client's health?

Priority Lifestyle Interventions (The "Optimize" Rule of Three): 1. _____ 2. _____
3. _____

Section 2: The Targeted Protocol (Safety & Specificity)

Apply the "Rule of Three" for supplements to avoid protocol fatigue and ensure safety.

Supplement Name	Purpose (Matrix Node)	Dose/Form	Safety Check (Interactions?)
1.			[] Checked CYP450
2.			[] Checked Redundancy
3.			[] Bioavailability OK

Redundancy Check: Are there overlapping ingredients (e.g., Zinc in multiple formulas)? []

Yes [] No **Exit Strategy:** What is the intended duration for these "Target" supplements?

Section 3: Troubleshooting Clinical Plateaus

If the client is not responding despite 100% compliance, audit for "Hidden Blockers."

Check for the following: - [] **Total Toxic Burden:** Is there evidence of mold, heavy metals, or environmental toxins? - [] **Limbic System:** Does the client feel safe? Is there chronic "threat" or emotional stress? - [] **Stealth Infections:** Could there be underlying viral loads (EBV) or tick-borne issues? - [] **Allostatic Load:** Is the current protocol adding more stress than the client can handle?

Section 4: Fatigue & Compliance Reflection

Client Overwhelm Score (1-10): ____ (1 = Calm, 10 = Paralysis)

Practitioner Reflection: - Is the protocol "titrated" to the client's current capacity? [] Yes [] No - Does the client have a clear "Win" they can achieve in the next 7 days? [] Yes [] No -
Action to reduce fatigue: _____

Next Steps / Supervisory Notes:

AccrediPro Standards Institute Certified Tool | R.O.O.T.S. Method™ Application

Instructions for the Practitioner:

1. **Optimize First:** Do not move to "Target" supplements until the client has committed to the three "Optimize" lifestyle tasks.
2. **The Rule of Three:** Limit your recommendations to 3 lifestyle changes and 3 supplements per phase to ensure 90%+ compliance.
3. **Safety First:** Always cross-reference the CYP450 system if the client is on pharmaceutical medications.
4. **Empowerment:** Use this worksheet during supervision to identify where the "bottleneck" in client progress is occurring.