

R.O.O.T.S. Clinical Team Vetting Scorecard

Candidate Name: _____ Position: _____ Date of Interview: _____ Interviewer: _____

Section 1: Phase 1 & 2 - Values & Case Study Challenge

Assess the candidate's alignment with root-cause resolution and systems-thinking.

Values Alignment (The Filter) - ☐ Demonstrates understanding of root-cause vs. "green pharmacy" (supplements for symptoms). - ☐ Expresses genuine passion for the Functional Medicine model. - ☐ Alignment with the practice mission and "therapeutic partnership" philosophy.

The Case Study Challenge (The Reveal Phase) - ☐ Successfully mapped the client timeline onto the Functional Medicine Matrix. - ☐ Prioritized the **Optimization Hierarchy** correctly (e.g., gut/lifestyle before hormones). - ☐ Identified clinical "red flags" or gaps in the Reveal data.

Section 2: Phase 3 & 4 - Coachability & Shadow Day

Evaluate clinical humility, empathy, and operational fit.

Criteria	Rating (1-5)	Observations/Notes
Coachability: Response to feedback on the Case Study		
Clinical Humility: Ability to say "I don't know, let's research"		
Empathy: Quality of interaction during the Shadow Day		
Operational Fit: Comfort with SOPs and the "Clinical Playbook"		
Communication: Clear, concise, and jargon-free for clients		

Section 3: Role-Specific Alignment

Check the box for the primary R.O.O.T.S. phase this role will lead.

- ☐ **Lead Practitioner:** Focus on *Reveal & Target* (Diagnosis/Strategy)
- ☐ **Health Coach:** Focus on *Optimize & Sustain* (Behavior/Accountability)
- ☐ **Nutritionist:** Focus on *Optimize & Target* (Therapeutic Diets/Supplements)
- ☐ **Care Coordinator:** Focus on *All Phases* (Logistics/Onboarding)

Section 4: Final Evaluation & Scoring

Total Score (Sum of Ratings): ____ / 25

Strengths:

Potential "Toxic Burdens" or Gaps:

Hiring Recommendation: ☐ Hire Immediately ☐ Second Interview Needed ☐ Do Not Pursue ☐ Keep on File

Next Steps:

- ☐ Reference Check
- ☐ Finalize Compensation (Hybrid Model: Base + Clinical/Retention Bonus)
- ☐ Send Clinical Playbook & Onboarding SOPs

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