Foundational Certificate Case-File Template

Structured capstone template for Module 3 (Integration & Application). Use the HSI five domains and the five-step HSI Method. Do not enter identifiable patient data.

Case header

Case title: _____ Date: _____ Track (coach / practitioner): _____

1 · Presenting concerns

In the person's own words where possible; how long each has been present; what prompted now.

2 · Relevant context (timeline)

Antecedents, triggers and mediators — the Module 1 timeline format.

Timeline notes

_____

_____

3 · HSI Healthspan Model — five-domain mapping

Domain	What to record	Findings
Biological State	Markers, symptoms, family history; separate established from exploratory.	
Regimen	Sleep, movement, nutrition, alcohol, smoking — pattern and stability, not a single snapshot.	
Exposome	Work environment, chemical/physical exposures, commute, light and noise.	
Mind	Stress load, cognitive strain, mood, recovery capacity.	
Connection & Purpose	Relationships, social texture, sense of purpose — what sustains or drains the plan.	

Gut findings (from Module 2): record what the gut picture shows and whether the gut-restoration sequence applies. If no gut findings are present, state that explicitly.

Gut findings & sequence decision

_____

_____

4 · HSI Method — all five steps, sequenced

Step	Your notes
Assess — whole-person picture across all five domains; pull gut findings in live, not after the scan	
Integrate — how domains influence one another (e.g. Regimen + Mind jointly driving a Biological State marker)	
Prioritise — what changes first, and why it is first	
Personalise — fit to the person's life, preferences and capacity	
Measure — what you track, how, and the review point	

5 · Priorities

What changes first, and why it is first. One to three priorities maximum.

Priorities

_____

_____

6 · Personalised plan

The agreed actions, fitted to this person’s life, preferences and capacity — and what they chose.

Personalised plan

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_____

7 · Scope / referral judgement

Tick one and justify: ☐ In scope ☐ Watchful monitoring (review point + escalation trigger) ☐ Referral (state the specific referral point)

Judgement and reasoning

_____

_____

8 · Follow-up & measurement plan

What is tracked, how, when it is reviewed, and what should trigger escalation before the review point.

Follow-up plan

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_____

Practitioner-track note

Add a short note on what Clinical Extension Layer content (Diploma-level) you anticipate needing for this specific case — a natural bridge into the Diploma decision.

Clinical Extension Layer anticipation

_____

_____

Safety note: any red flag (weight loss, rectal bleeding or bowel change, severe or worsening pain, out-of-pattern symptoms) or low confidence is a referral. New exertional chest tightness needs prompt medical assessment; ongoing, severe or concerning symptoms need emergency help. Stop and do not speculate about the cause.

Source: HSI Modules 1–3. The five domains are Biological State, Regimen, the Exposome, Mind, and Connection & Purpose; the Method steps are Assess, Integrate, Prioritise, Personalise, Measure.