

Medical Form Guide for Group/Chapter/Section Outings

Why do we need one?

A [Medical Form](#) is an essential tool for evaluating participant health profiles. There are a range of practical, useful, industry, legal, and group management reasons that define a medical form as a core responsibility of group leadership in a simple, practical tool. Medical Forms are a core element of a high quality program that prioritizes safety.

Medical Forms allow leaders to better:

- Evaluate/ Assess ability, limitations, participation for the outing activities, location, and difficulty.
- Identify specific individual needs, abilities, and relevant history and health.
- Allow personalized accommodation.
- Plan and prevent incidents and potential issues.
- Assess individual risk and how it impacts group risk.
- Respond and apply informed first aid.

How do we use the form?

- Request participants fill-out form, ideally pre-trip. Leaders should also fill-out a medical form.
- Review form, identify potential risks/limits, follow up with participants as appropriate.
- Keep form handy during trip, keep a copy in the first aid kit waterproofed in a ziplock bag along with group forms.
- Keep forms and information secure and private.
- In the event of an incident, refer to forms or pass along to Emergency Responders.
- Communicate use of forms and location to group/assistant leader so they can be used by group in case of leader incapacity.
- The medical form can be handed back to participants after the outing, or destroyed/ deleted by the leader upon completion of the outing.
- Waivers still need to be kept as they always have.

While designed to offer a good general medical background, the medical form is not a complete record of a participant. The Sierra Club strives to accommodate as many people as possible to give access to our trips to participants with a wide range of abilities and medical conditions.

How to Ask Participants Good Questions

It would be unrealistic to expect all leaders to be medical experts. Leaders can ask good, open-ended questions of the participants who are the experts of their conditions and

medications. Here are some things to keep in mind that may make things easier for everyone.

- Assure that all information is kept confidential and used only if needed.
- Ask open-ended questions, which cannot be answered with a “yes” or “no” response. *Let them do the talking!*
- Listen to the answers and follow-up. As leaders, we hope to develop an understanding of a participant’s medical history, any medications he or she takes and why, and what we can do to help them in the event of an emergency.
- When in doubt, ask – better to understand now than be surprised later.

Questions and Considerations:

Contact Information:

Do you have all their information in the event you need to contact them?

Emergency Contact:

Make sure to have all the emergency contact information, that it is legible, and that you understand the relationship to the participant.

Allergies:

When a participant lists an allergy and/or reaction, ask the following questions:

Describe to me what happens when you are exposed to this allergen.

When was the last time you had this reaction? If a severe reaction, have the reactions gotten better/worse/stayed the same over time?

Do you carry any medications to treat a reaction? If so, what is it and how do you take it. Where do you keep your medications? What are the side effects of the medication?

What do you need from me if you are exposed to the allergen?

Do you feel confident that you will be able to self-manage your condition if you are exposed?

At this point you will need to decide whether this affects their participation or put them at risk. If they have food allergies and you are providing food, can you accommodate their dietary needs by altering your menu or having them bring supplemental food?

Example: “I note that you have a gluten allergy. I am planning the following menu.... What changes need to be made? I will be able to add xxx and yyy, but you will need to round out the menu with your own items as you know what you need best. “

Participants who have known allergies may come with an EpiPen. Often allergic reactions demand two injections, so encourage participants to bring 2 EpiPens or the double dose Twinject EpiPen. Trip leaders can apply for an EpiPen prescription to carry in their first aid kit, so long as they have the right training. More info can be found [here](#).

Enrichment: Many are aware of the growing trend of severe allergic reactions to nuts (peanuts and tree nuts such as walnuts and cashews). What many don't realize is that many of the facilities that process nuts process a variety of other foods and spread the allergen to non-peanut items. When planning food, it is important to read labels for allergen content *and* whether they have had cross contact with the allergen. Also, food choices and lifestyles are increasingly confused with 'allergies'. Gluten is a good example, where very few people have celiac disease – be sure to ask if this is a true diagnosed allergy, a personal food/environmental reaction, or a personal health choice. While we want to try to accommodate as much as reasonably possible, is important to determine true allergies as the risk factors can be far greater.

Medications:

There are a myriad of medications that you will see listed on the medical form. These may include prescription, over-the-counter (OTC) and herbal remedies. Again, you don't need to be the expert on medications, just be good at asking the expert about their medications! You should ask the following questions:

- What do you take this medication for? How often do you take it?
- What happens when you don't take the medication? Do you self-manage well?
- Do you need to keep your medication under certain conditions when you travel (e.g. out of the sun, prevent from freezing)?
- Does this medication cause any side effects that I should be aware of?
- Have you made any **recent** changes to medications, brands, or dosages?
- Is there anything else that a doctor has told you to take? Any over-the-counter medications?

Act: Ask them to bring a secondary set of medications for you (the leader) to carry in case something happens to the primary set.

Example: "I see that you have listed Albuterol as a medication for your asthma. How long have you had asthma and how long have you been using this medication? Is this working well for you when you've been traveling in the backcountry? Will you be able to bring a second inhaler for me to carry in case something happens to the one you are carrying?"

Recent Illness:

If a participant has had a recent illness, you want to follow up with them so that they don't expose the other participants and/or get worse while on your trip. Participants with a recent illness should be discouraged from helping out in the camp kitchen. You will want to reemphasize hygiene on your trip. You should ask the following questions:

How long ago were you sick?

Are you fully recovered? How will it affect your participation on this trip?

Example: "I want to make sure that you have a great time on this trip. You list having had the flu for the last several weeks. Are you getting better?"

Physical or Mental Limitations and Restrictions - Questions for the leader:

Is this participant healthy enough to participate?

How often do they exercise? What does their exercise regimen entail?

Do they need to do a pack test (hikes with a similarly weighted pack on hikes) before being accepted?

Do they have limitations that will affect their participation or put them (or the group) at risk?

Do answers to your questions make sense and line-up with their history?

Are you confident they will be a positive member of the group?

Do you have doubts about them going on the trip? Why?

Other Medical Issues:

Approach any additional issues listed by asking open-ended questions and imparting that trip safety and enjoyment is your highest priority.