

Pre-Field Mental Health Intake – Questions to consider asking

Consider including mental health intake questions, in **addition** to your usual medical form questions, to be prepared to bring clients in to the field and set everyone up for success. Orient questions to elicit just “need-to-know” information (you likely don’t need to know details of someone’s trauma history, for instance), and be sure to clarify that information clients provide will be kept confidential, in accordance with ethics & law. Some potential questions are included below. Consider your own field context, your risk management procedures, and secure your own legal advice & insurance before deciding how to integrate these kinds of questions in to your own intake process.

You might ask a single, simple question that invites clients to share any relevant mental health information:

Please let us know **any psychological or mental health conditions, or symptoms, or experiences that may affect your participation.**

If you’d like to be more thorough, you might list examples of relevant mental health conditions that might particularly concern you or the folks you work with, or that you might be particularly prepared to support in the field. Consider: what are you going to do with this information? Note that if you’re going to list examples, it can be good to include “N/A” or “Nothing of concern” as a specific option. This can help normalize mental wellness and stability, as well as highlight a specific mental health concerns 😊

e.g.: anxiety, panic attacks, specific phobias, trauma or post-traumatic stress symptoms, depression or other mood disorder, grief, psychosis, disordered eating, intentional self-injury, suicidal thoughts, suicide attempt, or other mental health diagnosis or concern. Or, N/A.

If any symptoms or conditions are mentioned, you might consider gathering more information (on the intake form, or in a phone call) that will help you set up for success to know what to expect, manage risk, assess readiness, and be prepared to support the client in the field. For instance, you might ask the client to describe in more detail:

- What are your symptoms?
- How often does this occur?
- How long does it normally last?
- When is it likely to occur – are there any specific “triggers”?
- Do you try to avoid these triggers, confront them, ignore them, or something else?
- What are your “coping strategies” – what helps?
- Are there any unhealthy coping practices you are engaging in, or any coping practices that you want to change?
- Please describe your self-care practices or routine in general (*e.g.* nutrition, sleep, movement, personal time, prayer, meditation, *etc.*)
- Have you ever been hospitalized for this condition?
- Is hospitalization or therapy generally required when this happens?

Just as with medical first aid, it is relevant to gather information about medications and other psychoactive substances:

Please list any medications or other psychoactive substances that you are currently using, bringing in to the field, or have changed recently:

Name of medication & dosage:

What it is for?

When & how it is taken?
(regularly, or only as needed?)

Any side effects? What happens if you miss a dose?

* Note: Client, please duplicate any needed medications (bring twice as many as necessary), and give half to your guide at the trip start.

Do you normally drink coffee, tea, energy drinks, or other caffeine-containing beverages? If so, how much per day?

Do you smoke, vape, or use other substances, or has this changed recently?

You might consider asking if the client has existing or ongoing professional mental health supports in place. This may help you in a number of ways: the mental health professional may be contacted (with the client’s consent) to help you assess risk management, strategies, and client readiness to be in a field environment (especially for “more serious” mental health conditions); the professional may even be contactable *as a resource in the field* if necessary, and of course the professional may be an additional part of a client’s Field Support Plan, if one is made in the field, as well.

Have you seen a counsellor, psychiatrist, or other professional for mental health care in the past 12 months? If so, for what? (generally):

Please provide your therapist’s name and contact information if it could be helpful for us to talk to your therapist before or during the trip, as a resource to be better able to support you. (*Please also let your therapist know that we have **your** permission to contact him or her.*)

Therapist’s name:

Therapist’s email/phone:

Does your therapist know that you have given permission for us to contact him or her?

Consider ending on some high notes!

- Finally, what are you looking forward to?
- How might being in the field be *helpful* to you?
- What can we do to support you?