CALIFORNIA DEPARTMENT OF HEALTH CARE SERVICES

CRISIS CARE MOBILE UNITS PROGRAM

Guide for Onboarding Mobile Crisis Team Members

Introduction

Welcome to the "Guide for Onboarding Mobile Crisis Team Members." This guide outlines best practices for creating a positive team environment, providing supportive supervision, and ensuring team members' competency and critical thinking. A strong onboarding plan not only promotes retention but also helps team members discover their "why"—the personal mission that drives them in crisis intervention work.

Training Roles

- **Supervisors** oversee crisis training, clinical training, and operations/onboarding.
- **Training Officers and Specialists** may be leads or highly experienced team members who act as mentors to incoming personnel. They oversee daily training, shadowing, and documentation of training progress, and meet with a supervisor to provide feedback. Specialists provide training in specific skills needed for designated job duties/roles (e.g., field, phone, lead).

1. **Instilling a Positive Team Environment**
   Creating a supportive and cohesive team is essential to mobile crisis team success. Training Officers and Supervisors should do the following:

   - **Foster open communication**: Encourage transparency and regular check-ins.
   - **Model teamwork and collaboration**: Promote a culture of shared responsibility and mutual support.
   - **Recognize and celebrate successes**: Acknowledge individual and team achievements.
   - **Promote self-care and wellness**: Provide resources for managing stress and preventing burnout.
   - **Encourage inclusiveness and respect**: Ensure all team members feel valued and respected.

2. **Offering Supportive Supervision**
   Supervisors and Training Officers play a crucial role in guiding and supporting new mobile crisis team members. Best practices include the following:

- **Regular supervision meetings**: Schedule consistent one-to-one and team meetings.
- **Mentorship opportunities**: Pair new team members with experienced personnel (Training Officers/Specialists) for guidance and training in specific skills.
- **Encourage reflective practice**: Promote self-assessment and discussions about case experiences and challenges.
- **Provide constructive feedback**: Offer timely, specific feedback to promote professional growth. It is recommended to debrief after every phone call, consult, and field visit during the first 30 days or as needed.
- **Crisis debriefing and support**: Ensure access to support following high-intensity cases. Team members may need guidance on developing their own support routines.
- **Help team members discover their "why"**: Engage in conversations that connect team members with their personal mission and professional purpose.

3. **Ensuring Competency and Critical Thinking Assessments**
   Assessing competency and fostering critical thinking are key to successful onboarding. Training Officers, Specialists, and Supervisors should do the following:

- **Use a structured onboarding checklist**: Ensure all key competencies are covered.
- **Simulate crisis scenarios**: Conduct role-play exercises to assess decision-making and crisis intervention skills.
- **Perform ongoing skill evaluations**: Conduct periodic assessments through case reviews and direct observations.
- **Encourage case discussions**: Facilitate team discussions about complex cases to enhance problem-solving skills.
- **Develop individualized training plans**: Address areas for improvement through tailored training and resources.
- **Support long-term growth and retention**: Provide continuous learning opportunities and career development pathways to keep team members engaged.

Use of the Mobile Crisis New Team Member Onboarding Checklist

A structured onboarding checklist is a vital tool for supporting team members. It outlines essential tasks, trainings, and key conversations to ensure that all onboarding components are addressed clearly and consistently. Supervisors can use the checklist to track progress and identify any gaps in training.

Adapting the checklist as needed allows for flexibility in meeting individual needs. Setting 30-day and 60-day benchmarks establishes clear goals and expectations, while fostering team members' confidence, competency, and long-term success.

A well-structured onboarding process enhances team cohesion, ensures team members' competency, and supports critical thinking in crisis intervention. By following these best practices, Supervisors can foster a strong and effective mobile crisis team dedicated to serving the community with confidence and professionalism, while also promoting retention and engagement.

Acknowledgement

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This tool comprises the following sections:

1. **Prior to Start Date**

2. **First Day**

3. **Meeting with Supervisor**

4. **30-Day Training Plan**
   - Office Training
   - Dispatch, Deployment, and Field Training

5. **60-Day Training Plan**
   - Office Training
   - Dispatch, Deployment, and Field Training

6. **Self-Care and Team Member Wellness**

7. **Training Feedback**

8. **Training Checkpoints**
   - Triage/Phone Expectations
   - Field Response Expectations
   - Overall De-Escalation Expectations
   - Clinical Expectations

9. **The Encounter Workflow**

TEAM MEMBER INFORMATION	
Name	
Title	
Start Date	
Scheduled Hours	
NPI	
License #	
Training Officer	
Supervisor	
30-Day Date	
60-Day Date	

PRIOR TO START DATE		
This is an opportunity to stay in contact with new team members. Some agencies have a prolonged and extensive background check process, leaving new hires unsure of where they stand in the team integration process. Engaging them through regular check-ins and answering their questions helps establish rapport, reduce anxiety, and lower the likelihood of them accepting another offer before the background check is complete.		
✓	**Task**	**Date Completed Trainer/Trainee Initials**
	Welcome email including office location, parking, and point-of-contact person	
	Invite new team members to visit the clinic and meet the team	
	Ensure desk space is clean, stocked, and decorated; welcome new team members	
	Create a training schedule according to job duties with the assigned training officer	
	Print/create a training binder with a site SOP (Standard Operating Procedure) Manual	
	Confirm HR team members' credentialing and trainings, including training dates	
	Confirm team members' computer login and e-mail setup	
	Confirm EHR access	
	Other IT access requests	
Other		
Notes		

FIRST DAY		
There is a lot of information to absorb and many questions during the first few days of a new job. Ensuring that team members feel comfortable, know where to go for support, have clear direction, and understand what to expect in the coming weeks helps them feel confident, excited, and eager for this new chapter.		
✓	**Task**	**Date Completed Trainer/Trainee Initials**
Orientation		
	• Crisis program • Training schedule • Training expectations • Crisis manual • Onboarding tool/checklist	
Complete Needed Office Forms and Documents		
	• Professional license/certification, driver's license, insurance, etc. • Medi-Cal certification provider • NPPES/NPI update • Emergency forms • Confidentiality forms	
Office/Building Orientation		
	Tour of Building • Employee entrances • Swipe card/key system • Restrooms • Breakrooms • Workstation • Confidential shredder locations • Supervisor offices • Administration offices • Supply closet • Water/gas shutoff • Fleet location	
	Emergency Procedures • Emergency exits • Emergency kits • Disaster bags • Safe haven/lockdown procedures • Fire pulls/extinguishers • Emergency codes • Bomb threat • Evacuation plans and procedures	

	• Security access	
	Team Introductions • Roles and responsibilities • Chain of command • Team meeting schedule	
	Issue Equipment • Keys • Badge • Cell phone • Laptop • Narcan • Personal safety alarm • Uniform • Office supplies • Ergonomic evaluation	
Review Policies and Procedures		
	• Location specific • Fleet policy	
Review Schedule		
	• Lunch and breaks • Checking in and out • Calling in sick • Requesting vacation • Attendance and tardiness policies	
Review Operational Tasks		
	• Submitting a service ticket to operations or IT • Reporting an incident • Requesting fleet maintenance • Requesting reimbursement • Requesting travel expenses • Submitting a procurement request • Requesting office items/tools • Reporting time • Accessing employee portal • Using and troubleshooting work devices (e.g., desk phone/mobile phone, tablet, computer)	

Other		

Notes

MEETING WITH SUPERVISOR		
This is an opportunity to get to know your new team members, discover their "why," align it with the program goals and expectations, and build a collaborative relationship. Use regular supervision to strengthen team culture, openness, communication, and development. Creating an open and safe space for team members to ask questions, gain clarity, and understand team dynamics fosters a sense of belonging, growth, and purpose—both within the team and the community.		
✓	**Task**	**Date Completed Trainer/Trainee Initials**
	Review of mission, vision, values of agency/team	
	Review supervision schedule: • Frequency • Format (group/individual) • Licensing and certification supervision requirements	
	Review program guide/pertinent policies and procedures	
	Review work performance evaluation expectations and frequency	
	Discuss goals for professional growth and obtaining new skills	
	Discuss referred feedback mechanisms	
	Discuss preferred learning style	
Other		
Notes		

30-DAY TRAINING PLAN		
Office Training		
Follow-up is necessary after the new members watch the training modules. Use individual supervision, group supervision, and team meetings to continue the conversation. Ask open-ended, thought-provoking questions to elicit discussion around core crisis-related topics and engagement with individuals, families, and the community. An effective crisis team is built through continual learning, engagement, and honing their skills via feedback and supervision.		
✓	**Task**	**Date Completed Trainer/Trainee Initials**
Legal/Ethical Required Trainings		
	• HIPAA privacy and security • Mandated reporting • Sexual harassment for employees (California) • Duty to warn	
M-TAC Required Core Trainings		
	• Conducting a crisis assessment • Delivering trauma-informed care harm reduction strategies • Harm reduction strategies • Crisis safety plan development • Crisis intervention and de-escalation strategies	
M-TAC Required Enhanced Trainings		
	• Crisis response strategies for special populations: – Children, youth, and families – Tribal communities – Individuals with intellectual and developmental disabilities (I/DD) • Co-occurring disorders/responding to SUD crises • Delivering culturally responsive crisis care	
Medical Chart Documentation Training		
	• Orient to EHR/documentation processes • Become familiar with M-TAC (or agency) standardized tools: – Crisis assessment tool – Dispatch and triage tool – Safety planning tool • Other standardized tools: – Columbia screening tool – Mental status exam – CRAFFT (substance screening tool) – CAT (crisis assessment tool) • Diagnosis	

	• Begin to complete documentation with support from peers and/or supervisor	
Shared Drives		
	• Access • Tour of important document locations	
Disaster Trainings		
	• Disaster Mental Health • Psychological First Aid • FEMA 100 • FEMA 700 • CMD Training (Crisis Management Debriefing) • Other	
Crisis-Specific Trainings		
	• CPI Training (Crisis Prevention Institute) • CIT Training (Crisis Intervention Team) Law Enforcement • In-House/Field Safety Training and Best Practices • Other	
Other		
Notes		

<table>
<tr><th colspan="3">30-DAY TRAINING PLAN</th></tr>
<tr><th colspan="3">Dispatch, Deployment, and Field Training</th></tr>
<tr><td colspan="3">After crisis calls, initiate a discussion to assess what team members heard and the interventions used, what worked well, and what could be improved. This helps supervisors gauge knowledge and critical thinking skills while giving team members a safe space to ask questions.</td></tr>
<tr><th>✓</th><th>Task</th><th>Date Completed Trainer/Trainee Initials</th></tr>
<tr><td colspan="3">Shadowing Plan for Dispatch Processes</td></tr>
<tr><td></td><td>• Observe phone calls (program to determine appropriate number of calls)
• Begin support on phone calls, triage, and dispatch of calls
• Follow up each call by reviewing the case, interventions, plan, and safety observations with a supervisor
Example:
• Five phone screens observed with consultation
• Five phone screens taken with consultation (with Training Officer)
• Five phone screens taken with consultation (independently)</td><td></td></tr>
<tr><td colspan="3">Shadowing Plan for Field Calls</td></tr>
<tr><td></td><td>• Observe field calls (program to determine appropriate number of calls)
• Begin to support on calls covering the following:
– Consents
– Evaluation
– Safety plan
– Referrals
– Debrief
– 72-hour follow-ups
• Follow up each call by reviewing the case, interventions, plan, and safety observations with a supervisor</td><td></td></tr>
<tr><td colspan="3">Community Partners: Tour and Meet Contacts, Learn Referral Processes, and Partnership Expectations</td></tr>
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	• Law enforcement briefings and schedule • School meetings • Outreach schedule • Hospital locations • Crisis stabilization center locations • Housing supports • Substance use disorder support/clinics • Frequently used community-based organizations • Other	
Safety in the Field and Situational Awareness		

	• Communication with leadership/dispatch
	• Code words with field partner
	• Neighborhood/city “hotspots”
	• Emergency response
	• When to call 911
	• Red flags for safety risks:
	  – Pacing, clenched fists, rapid speech, extreme paranoia
	  – Weapon visible or suspected
	  – Intoxication with unpredictable behavior
	  – History of aggression toward responders	

Suicide Risk and Intervention Protocol		
	• High-risk signs: Direct threats, means to act, recent attempt • Immediate actions: Secure lethal means, initiate a voluntary/involuntary hold, if necessary • Safety planning: Identify coping supports, crisis contacts, and follow-up care	
De-Escalation and Engagement Strategies		
	• Establish safety and trust: Speak calmly, acknowledge distress, offer reassurance • Assess needs and identify stressors: Use open-ended questions and active listening	

	• Offer solutions and next steps: Provide immediate support options, resource connections, and stabilization plan • Verbal de-escalation tips: – Use a low, calm voice – Avoid power struggles – Offer small choices to create a sense of control – Validate feelings: “I hear you. That sounds really difficult.”	
Vehicles		
	• Policy • Logs • Gas • Maintenance • Accident • Transportation procedure	
Other		
Notes		

60-DAY TRAINING PLAN		
Office Training		
By 60 days into the onboarding process, team members should have a solid understanding of their role, company policies, and daily responsibilities. They should be gaining confidence in applying their skills, working more independently, and integrating into the team. While they may still be refining certain tasks, they should actively contribute to projects and seek feedback for continuous improvement. At this stage, the shadowing process may be reversed, with the Training Officer observing the onboarding of team members and offering feedback and tips.		
✓	**Task**	**Date Completed Trainer/Trainee Initials**
M-TAC-Recommended Supplemental Trainings		
	• Community Partnership Coordination Strategies • Staffing Mobile Crisis Teams and Team Composition • Aftercare and/or Post-Crisis Follow-up Strategies • Motivational Interviewing • Suicide Prevention • Psychiatric Advance Directives • Provider Safety • Crisis Response for Rural Areas • Accessibility Strategies • Service Guidelines and Access to Services Criteria • Documentation Requirements for Mobile Crisis Services • Medi-Cal Eligibility Verification • Claiming/Billing and Reimbursement for Mobile Crisis Services • Data Reporting for Mobile Crisis Services • Process and Safeguards for Maintaining Privacy and Confidentiality • Dispatch and Timely Response of Mobile Crisis Teams • Considerations and Strategies for Meeting Timeliness Standards • Facilitation of Warm Handoffs to Alternative Treatment Settings • Transportation Strategies for Beneficiaries Experiencing a Behavioral Health Crisis • Appropriate Use of Telehealth for Mobile Crisis Services • Coordination with Family Urgent Response System, Regional Centers	

Medical Chart Documentation Training		
	• Complete the entire documentation process with minimal corrections, including: – Evaluation – Safety plan – Progress notes – Billing	
Accessing Language Services		
	• Language vendor • Documentation	
Training Modules		
	• Agency-specific trainings • Role/classification-specific trainings	
Other		
Notes		

60-DAY TRAINING PLAN		
Dispatch, Deployment, and Field Training		
At this point, new team members should be leading calls and forming relationships with community partners. Encouraging collaboration with colleagues and stakeholders fosters a sense of purpose and belonging within the organization.		
✓	**Task**	**Date Completed Trainer/Trainee Initials**
Shadowing Plan for Dispatch Processes		
	• Be comfortable taking crisis phone calls, triaging, and dispatching • Complete dispatch and triage tool with minimal corrections	
Shadowing Plan for Field Calls		
	• Be comfortable being the support on calls • Begin to lead crisis calls • Follow up each call by reviewing case, interventions, plan, and safety observations with a supervisor • Complete M-TAC (or agency) standardized tools with minimal corrections • Use crisis assessment tool • Use safety planning tool	
Tools for Safety Planning		
	• Coping skills worksheet • Apps • Safety plan worksheet • Local resources • Hotlines	
Other		

Notes

SELF-CARE AND TEAM MEMBER WELLNESS		
Crisis response is emotionally and physically demanding. Ongoing monitoring and reminders for team members to prioritize their self-care and well-being is essential to long-term success. Create an environment of support and celebration and find ways to honor team members and their life-saving work. Encourage and model work–life balances to help prevent burnout.		
✓	**Task**	**Date Completed Trainer/Trainee Initials**
Signs of Stress		
	• Burnout • Compassion fatigue • Morale injury • Crisis response (fight/flight/freeze)	
In-the-Moment Grounding		
	• Breathing exercises • Grounding • Resourcing	
Available Supports		
	• Supervision/call debrief • Peer support • EAP/benefits • Work–life balance	
Other		
Notes		

TRAINING FEEDBACK

Receiving training feedback from new team members who complete an onboarding plan is crucial for identifying gaps in the training process and improving future onboarding experiences. Their fresh perspectives provide valuable insights into the clarity, effectiveness, and relevance of the training materials. This feedback enables organizations to refine their approach, ensuring new team members feel supported, engaged, and well-prepared.

✓	Evaluation Content	Date Completed Trainer/Trainee Initials
Effectiveness of Training Methods		
	• Were the training sessions engaging and interactive? • Was there a good mix of hands-on learning and shadowing?	
Support and Guidance		
	• Did trainers provide adequate support? • Were there opportunities to ask questions and receive feedback?	
Confidence and Readiness		
	• After the training, do team members feel confident in their ability to perform their job? • Are there still areas where they need support?	
Overall Experience and Suggestions		
	• What aspects of the training were most helpful? • What can be improved?	
Other		
Notes		

TRAINING CHECKPOINTS		
Triage/Phone Expectations		
Receiving objective feedback during expectations reviews helps new team members understand their progress and areas for growth. It reinforces job expectations and builds confidence in meeting role requirements. For trainers, this process highlights where additional support or training may be needed, ultimately enhancing future onboarding efforts. Structured evaluations lead to better-prepared and more engaged team members.		
✓	**Task**	**Date Completed Trainer/Trainee Initials**
Professional Communication		
	• Answers calls within three rings • Actively listens, reflects key points, and validates concerns • Maintains a calm, reassuring, and professional tone • Uses clear, direct, concise language to avoid misunderstandings • Redirects the conversation to focus on the crisis • Accesses language lines effectively	
Customer Service		
	• Asks triage questions effectively • Documents caller responses accurately • Provides psychoeducation and crisis guidance • Supports de-escalation over the phone • Maintains neutrality and objectivity	
Safety Risk & Follow-Up		
	• Screens for safety risks (DTS, DTO, GD) • Screens for the safety of the responding team (e.g., assaultive behaviors, weapons, animals) • Gathers key crisis details and all parties involved • Uses de-escalation skills effectively • Assesses urgency and level of risk • Provides stabilization guidance to callers • Conducts follow-up calls to reassess safety risk post-crisis and ensure ongoing stability	
Additional Skills		
	• Retrieves collateral info from multiple sources (e.g., medical chart, call records) • Problem-solves and provides clear guidance • Documents triage and crisis disposition clearly and objectively • Presents cases effectively to leadership, including risk assessment and recommendations	

	• Collaborates with other departments (e.g., APS, CPS, schools, ER, CBO, PD)	
Other		
Trainer Feedback		

TRAINING CHECKPOINTS		
Field Response Expectations		
Reviewing expectations for new team members is vital and supports the ongoing professional development for experienced team members. Quality checks help ensure alignment with evolving standards and processes and ensure consistency across the team. Engaging in training and review processes can also offer fresh perspectives and encourage continuous learning.		
✓	**Task**	**Date Completed Trainer/Trainee Initials**
Readiness and Preparedness		
	• Deploys within 15 minutes of dispatch • Dresses appropriately for crisis response • Carries necessary materials (e.g., charts, pens, 5150/5585 forms, go bag, PPE)	
Professionalism and Boundaries		
	• Presents professionally to clients, families, and providers • Maintains empathy and respect during crisis intervention • Stays objective and neutral (minimizes countertransference)	
Safety and Collaboration		
	• Ensures a safe environment for self, team, and consumers • Uses de-escalation, time, and distance strategies to avoid physical intervention • Communicates effectively with partners and recognizes team safety and when to implement safety protocols • Communicates clearly and effectively in crisis situations • Consults with a Supervisor when appropriate • Collaborates with other agencies (e.g., APS, CPS, schools, ER, CBO, PD)	
Other		

Trainer Feedback

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TRAINING CHECKPOINTS		
Overall De-Escalation Expectations		
Regular expectations reviews help build leadership by encouraging experienced team members to take on mentorship and coaching roles. Through guiding new team members, seasoned staff develop essential leadership skills such as communication, problem-solving, and accountability. This process creates a strong pipeline of future leaders who understand the values and expectations.		
✓	**Task**	**Date Completed Trainer/Trainee Initials**
Crisis Response and Critical Thinking		
	• Stays focused on crisis needs, disposition, and safety planning • Collects accurate information for decision making • Works flexibly and demonstrates good judgment	
Professionalism and Boundaries		
	• Independent task completion • Completes crisis-related paperwork (e.g., assessments, consents, 5150 forms, charting) • Maintains objectivity in crisis situations • Reads social and clinical cues effectively including verbal, nonverbal, and paraverbal	
Client Communication and Crisis Flow		
	• Explains consents to clients/guardians • Collaborates on safety planning with clients and providers • Completes and explains 5150/5585 process • Communicates effectively with the team and clients • Follows crisis response protocol (phone screen, consult, assess, safety plan) • Completes all documentation within 24 hours	
Other		

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Trainer Feedback

TRAINING CHECKPOINTS		
Clinical Expectations		
Promoting a culture of continuous improvement by encouraging both new and experienced team members to reflect on their performance and seek growth opportunities is a key benefit of regular reviews. This ongoing feedback process helps identify strengths and areas for development, enhances job satisfaction, strengthens teamwork, and improves overall organizational efficiency.		
✓	**Task**	**Date Completed Trainer/Trainee Initials**
Assessment and Problem-Solving		
	• Identifies client risks, strengths, and protective factors • Screens for symptoms and severity • Navigates differences in clinical perspectives with professionalism, empathy, and a collaborative approach	
Consultation and Diagnosis		
	• Consults with a Supervisor and provides relevant information • Diagnoses appropriately based on available data • Completes a thorough clinical assessment with MSE and formulation	
Other		
Trainer Feedback		

The Encounter Workflow

The following visual was created in partnership with the San Francisco Department of Public Health. It highlights a workflow that outlines how calls are processed and how decisions are made. Following a standard approach provides clarity and consistency in operations. The diagram may help staff quickly understand the steps involved, reducing errors and improving efficiency.

A well-structured workflow also enhances decision-making by offering a clear framework for handling different scenarios, ensuring uniform responses and better customer service. Additionally, it serves as a valuable training tool for new employees, helping them grasp processes more quickly, while also allowing experienced staff to identify areas for improvement.