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Today's Training

» **The Importance of a Structured Onboarding Tool**

» **The Onboarding and Training Checklist**

» **Training and Shadowing Checkpoints**

» **The Encounter Workflow**

Why an Onboarding Tool Is Valuable

Promotes Retention

Helps new hires feel supported and engaged

Ensures Consistency

Standardizes training for all team members

Builds Confidence

Establishes clear expectations and structured learning

Supports Long-Term Success

Encourages continuous learning and growth

Enhances Team Efficiency

Reduces onboarding time and improves performance

The Onboarding Checklist

Onboarding Checklist

Ensures training consistency

Provides structured a learning experience

Allows for reviewing cases and real-life scenarios for discussion and learning

Enhances decision-making and critical thinking

Supports a smooth transition

Reduces anxiety and helps new hires feel prepared and supported

Sets 30- and 60-day benchmarks for success

Clear goals for confidence and competency

Team Member Information

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

Prior to Start Date

Pro Tip:

This is an opportunity to stay in contact with new team members. Some agencies have a prolonged and extensive background check process, which can leave new hires unsure of where they stand in the team integration process. Engaging them by continually checking in and answering questions helps establish rapport, decrease anxiety, and reduce the possibility that they will accept another offer before the background check is complete.

PRIOR TO START DATE

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✓	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; welcoming new team members	
	Create a training schedule according to their job duties with assigned training officer	
	Print/create a training binder with site SOP (Standard Operating Procedure) Manual	
	Confirm HR team members credentialing and trainings, including training dates	
	Confirm team members computer login and email setup	
	EHR access	
	Other IT access requests	
	Other:	
	Other:	

The First Day

Pro Tip:

There is a lot of information to learn and many questions to ask during the first few days of a new job. Ensuring that team members feel comfortable, know where to go for support, have direction, and understand what the coming weeks entail allows them to feel confident, excited, and eager for this new chapter.

- 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, Tardiness Policy

Review Operational Tasks
- Submit a service ticket to operations or IT
- Incident report
- Fleet maintenance request
- Reimbursement request
- Travel expense request

FIRST DAY

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✓	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 shut off • Fleet location	
	Emergency Procedures • Emergency Exits	

Supportive Supervision

Best Practices for Supportive Supervision

» Holding regular supervision meetings and mentoring

» Encouraging reflective practice and providing constructive feedback

» Conducting crisis debriefing and offering support

» Helping team members discover their "why"

Supervision Meeting

Pro Tip:

This is an opportunity to get to know your new team members, find out about their "why," align it with the program goals and expectations, and build a collaborative relationship. Use regular supervision to further enhance team culture, openness, feedback, communication, and development. Creating an open and safe space for team members to ask questions, gain clarity, and understand dynamics ensures feelings of belonging, growth, and purpose within the team and the community.

MEETING WITH SUPERVISOR

Pro-Tip: This is an opportunity to get to know your new team members, find out about their "why," align it with the program goals and expectations, and build a collaborative relationship. Utilize regular supervision to further enhance team culture, openness, feedback, communication, and development. Allowing an open and safe space for team members to ask questions, gain clarity, and understand dynamics ensures feelings of belonging, growth, and purpose on the team and in the community.

✓	Task	Date Completed Trainer/Trainee Initials
	Review of Mission, Vision, Values of Agency/Team	
	Supervision Schedule • Frequency • Format (Group/Individual) • Licensing and Certification supervision requirements	
	Program Guide/Pertinent Policy and Procedures	
	Work Performance Evaluation Expectations and Frequency	
	Goals for professional growth and obtaining new skills	
	Discuss preferred feedback mechanisms	
	Discuss preferred learning style	
	Other:	
	Other:	
	Other:	

Training Roles and a Positive Team Environment

Training Roles:

» **Supervisor:** Oversees crisis, clinical, and onboarding training
» **Training officer/specialist:** Mentors, oversees one-on-one training, shadows, and documents progress

Instilling a Positive Team Environment:

» Foster open communication
» Encourage teamwork and collaboration
» Recognize and celebrate successes
» Promote self-care and inclusivity

Pro Tip:

Follow-up is necessary after new members watch the training modules through conversations during individual supervision, group supervision, and team meetings. 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 on continual learning, engagement, and skill development through feedback and supervision.

✓	Task	Date Completed Trainer/Trainee Initials
	– 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		

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	

DHCS
CALIFORNIA DEPARTMENT OF HEALTH CARE SERVICES
CRISIS CARE MOBILE UNITS PROGRAM

Pro Tip:

Follow crisis calls with a discussion to assess what team members heard, the interventions used, what worked well, and what could have been improved. This allows supervisors to gauge knowledge and critical thinking skills and allows for team members to ask questions in a safe learning environment.

Community Partners – Tour and Meet Contacts, as Possible
Learn Referral Processes, Partnership Expectations

- 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 parano
  - 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 & Trust: Speak calmly, acknowledge distress, offer reassurance
- Assess Needs & Identify Stressors: Use open-ended questions and active listening
- Offer Solutions & Next Steps: Provide immediate support options, resource connections, and a stabilization plan
- Verbal De-Escalation Tips
  - Use a low, calm voice

✓	Task	Date Completed Trainer/Trainee Initials
Shadowing Plan for Dispatch Processes		
	• Observe phone calls (program to determine appropriate number of calls) • Begin to be a support on phone calls, triage, and dispatch of calls • Follow up each call with a discussion with your supervisor to review the case, interventions, plan, and safety observations *Example:* • 5 Phone Screens Observed with consultation • 5 Phone Screens taken with consultation (with training officer) • 5 Phone Screens taken with consultation (independently)	
Shadowing Plan for Field Calls		
	• Observe field calls (program to determine appropriate number of calls) • Begin to be a support on calls covering the following: – Consents – Evaluation – Safety Plan – Referrals – Debrief – 72-hour Follow-Ups • Follow-up each call with a discussion with your supervisor to review the case, interventions, plan, and safety observations	

60-Day Training Plan — Office

Pro Tip:

Sixty 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 be actively contributing to projects and seeking feedback for continuous improvement. Shadowing roles may be reversed at this point, having the training officer shadow the work of the onboarding team members, 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	

Pro Tip:

At this juncture, new team members should be leading calls and forming relationships with community partners. Allowing them to collaborate with colleagues and stakeholders fosters a sense of belonging and purpose 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 with a discussion with your supervisor to review the case, interventions, plan, and safety observations • Complete M-TAC (or agency) standardized tools with minimal corrections • Crisis Assessment Tool • Safety Planning Tool	
	Tools for Safety Planning	
	• Coping skills worksheet • Apps • Safety Plan Worksheet • Local Resources • Hotlines	
	Other	

Encouraging Self-Care

Learning about self-care early in the onboarding process helps new team members develop healthy coping strategies, manage stress effectively, and build long-term resilience in crisis intervention work.

» Prevents burnout

» Enhances performance

» Encourages work-life balance

» Promotes emotional resilience

» Fosters a healthy team culture

Self-Care

Pro Tip:

Crisis response is challenging, and both emotionally and physically draining. Continual monitoring and reminders for team members to prioritize their self-care and well-being are paramount to team success. Create an environment of support and celebration, and find ways to honor team members and their life-saving work. Encourage and role-model work-life balance to keep burnout at bay.

✓	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

Regularly gathering feedback from staff about the training process ensures onboarding remains effective, addresses real challenges, and continuously evolves to meet the needs of new team members.

» **Improves training effectiveness:** Staff insights help refine and enhance onboarding.

» **Identifies gaps and challenges:** Ensures training covers all necessary skills and knowledge.

» **Encourages continuous improvement:** Adapting based on feedback leads to a stronger program.

» **Fosters open communication:** Demonstrates that leadership values team input.

» **Enhances staff engagement:** Involving team members in the process boosts morale and retention.

Training Feedback

Pro Tip:

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 helps organizations refine their approach, ensuring new team members feel supported, engaged, and well-prepared for their roles.

✓	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		
	• Do team members feel confident in their ability to perform their job after the training? • Are there still areas needing additional support?	
Overall Experience and Suggestions		
	• What aspects of the training were most helpful? • What can be improved upon?	
Other		

Individualized Training Plans

Tailored learning to address skill gaps

Ongoing Skill Evaluation

Regular assessments through case reviews and observation

Long-Term Growth and Retention

Encourages career development and engagement

Improves Team Efficiency

Reduces onboarding time and increases readiness

Ensuring Competency in Crisis Intervention

Triage/Phone Expectations

Pro Tip:

Receiving objective feedback from an expectations review helps new team members clearly understand their progress and areas for improvement. It reinforces job expectations, ensures alignment with agency standards, and builds confidence in meeting role requirements. For trainers, this feedback highlights specific areas where additional support or training may be needed, allowing them to refine their approach and enhance future onboarding experiences. This structured evaluation fosters a more effective learning process, leading to better-prepared and more engaged team members.

✓	Task	Date Completed Trainer/Trainee Initials
Professional Communication		
	• Answers calls within 3 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 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 safety of responding team (assaultive behaviors, weapons, animals, etc.) • Gathers key crisis details and all involved parties • Uses de-escalation skills effectively • Assesses urgency and level of risk • Provides stabilization guidance to callers	

Field Response Expectations

Pro Tip:

Reviewing expectations for new team members is vital

and also supports ongoing professional development

of experienced team members. Quality checks help

experienced team members stay aligned with evolving

standards and processes, ensuring consistency across

the team. Additionally, participating in training and

review processes can offer fresh perspectives and

encourage continuous learning.

✓	Task	Date Completed Trainer/Trainee Initials
Readiness & Preparedness		
	• Deploys within 15 minutes of dispatch • Dresses appropriately for crisis response • Carries necessary materials (charts, pens, 5150/5585 forms, go-bag, PPE, etc.)	
Professionalism & Boundaries		
	• Presents professionally to clients, families, and providers • Maintains empathy and respect during crisis intervention • Stays objective and neutral (minimizes countertransference)	
Safety & Collaboration		
	• Ensures a safe environment for self, team, and consumers • Uses de-escalation, time, and distance strategies to avoid physical intervention • Communicates effectively with partner and recognizes team safety and when to implement safety protocols • Communicates clearly and effectively in crisis situations • Consults with supervisor when appropriate • Collaborates with other agencies (APS, CPS, Schools, ER, CBO, PD, etc.)	

De-Escalation Expectations

Pro Tip:

Regular reviews of expectations help build leadership from within by encouraging experienced team members to take on mentorship and coaching roles. By guiding new team members, seasoned team members develop essential leadership skills such as communication, problem-solving, and accountability. This process fosters a culture of growth and development, creating a strong pipeline of future leaders who understand the organization's values and expectations firsthand.

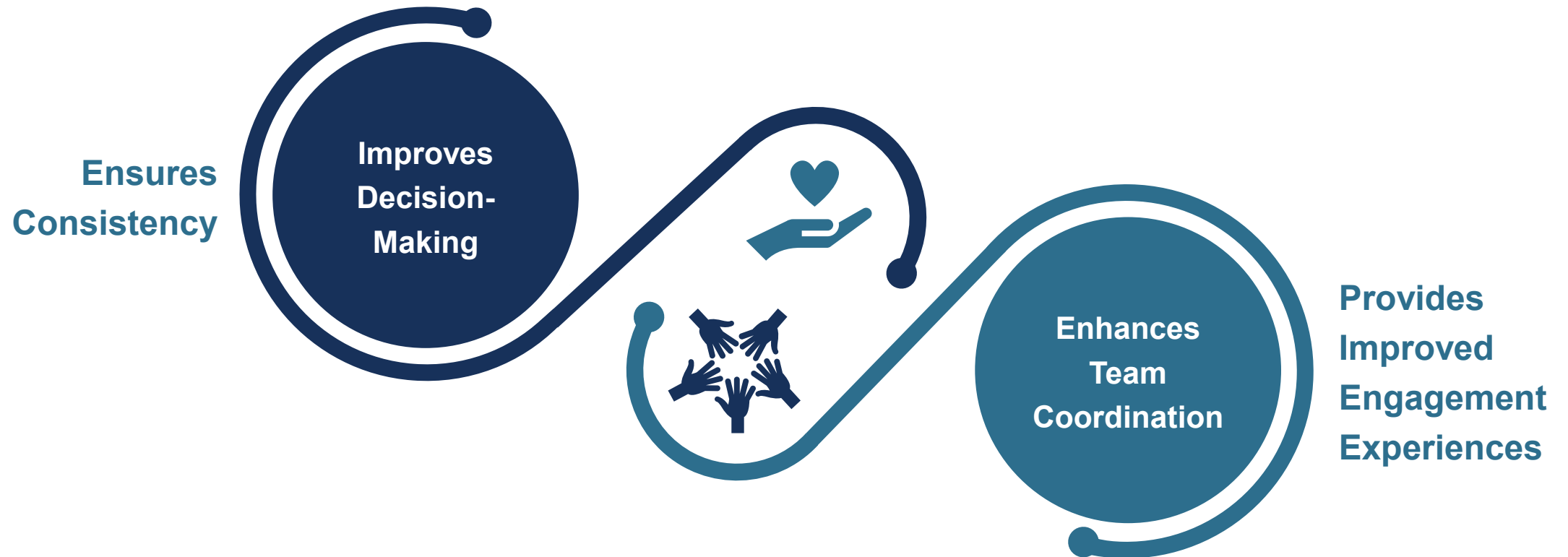| ✓	Task	Date Completed Trainer/Trainee Initials
Crisis Response & Critical Thinking		
	• Stays focused on crisis needs, disposition, and safety planning • Collects accurate information for decision-making • Works flexibly and demonstrates good judgment	
Professionalism & Boundaries		
	• Independent task completion • Completes crisis-related paperwork (assessments, consents, 5150 forms, charting) • Maintains objectivity in crisis situations • Reads social and clinical cues effectively including verbal, non-verbal, and paraverbal	
Client Communication & Crisis Flow		
	• Explains consents to clients/guardians • Collaborates on safety planning with clients and providers • Completes and explains 5150/5585 process • Communicates effectively with team and client • Follows crisis response protocol (phone screen, consult, assess, safety plan) • Completes all documentation within 24 hours	
Other		

Clinical Expectations

Pro Tip:

Promoting a culture of continuous improvement by encouraging both new and experienced team members to reflect on their performance and seek growth opportunities is another key benefit of regular reviews. This ongoing feedback process helps identify strengths and areas for development, leading to higher overall job satisfaction, better teamwork, and increased efficiency across the organization.

✓	Task	Date Completed Trainer/Trainee Initials
Assessment & 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 & Diagnosis		
	• Consults with supervisor and provides relevant information • Diagnoses appropriately based on available data • Completes a thorough clinical assessment with MSE and formulation	
Other		
Trainer Feedback		

Encounter Workflow

Ensures Consistency

Improves Decision-Making

Enhances Team Coordination

Provides Improved Engagement Experiences

The Encounter Workflow

This visual highlights the workflow of how calls are processed and how decisions are made. Following a standard approach provides clarity and consistency in operations. It helps 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 and helps them grasp processes faster while allowing experienced staff identify areas for improvement.

Call comes in. Complete triage paperwork.

Response team call caller with an ETA and case update.

Meet with all parties and form a plan.

Research individual in other databanks (medical chart, call logs).

Send call details and update dispatch records.

Call supervisor for consultation.

Consult with supervisor.

Dispatch team.

Review safety plan with all parties.

Field visit?

Yes

Return to office and complete documentation.

No

Provide resources and complete documentation.

Phone Team
Field Team

A strong onboarding process sets the foundation for a cohesive, confident, and competent crisis team— empowering new members to provide effective support while feeling supported themselves.