

Guide for Onboarding Mobile Crisis Team Members

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**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**

* **Supervisor**: Overseeing crisis training, clinical training, and operations/onboarding.
* **Training Officers/Specialists**: May be lead or highly experienced team members acting as a mentor to incoming personnel. Oversees daily training, shadowing, document training progress, meets with Supervisor to provide feedback. Specialists provide training in specific skills needed for specific job duties/roles (i.e. field, phone, lead).

**1. Instilling a Positive Team Environment**

Creating a supportive and cohesive team is essential for mobile crisis team success. Supervisors and Training Officers should:

* **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 Inclusivity and Respect**: Ensure all team members feel valued and respected.

**2. Supportive Supervision**

Supervisors and Training Officers play a crucial role in providing guidance and support to new mobile crisis team members. Best practices include:

* **Regular Supervision Meetings**: Schedule consistent one-on-one and team meetings.
* **Mentorship Opportunities**: Pair new team members with experienced team members (Training Officers/Specialists) for guidance and training on specific skills assigned.
* **Encouraging Reflective Practice**: Promote self-assessment and discussions about case experiences and challenges.
* **Providing Constructive Feedback**: Offer timely and specific feedback to promote professional growth. It is recommended to debrief after every phone call, consult, and field visit for the first 30 days or as needed.
* **Crisis Debriefing and Support**: Ensure team members have access to support after handling high-intensity cases. Team members may need guidance on creating their own support routine.
* **Helping Team Members Discover Their 'Why:’** Engage in conversations that help team members connect with their personal mission and professional purpose.

**3. Ensuring Competency and Critical Thinking Assessments**

Assessing competency and fostering critical thinking is key to successful onboarding. Supervisors and Training Officers should:

* **Use a Structured Onboarding Checklist**: Ensure all key competencies are covered during training.
* **Simulated Crisis Scenarios**: Conduct role-play exercises to assess decision-making and crisis intervention skills.
* **Ongoing Skill Evaluations**: Implement periodic assessments through case reviews and direct observations.
* **Encourage Case Discussions**: Facilitate team discussions on complex cases to enhance problem-solving skills.
* **Develop Individualized Training Plans**: Address areas for improvement with tailored training and resources.
* **Support Long-Term Growth and Retention**: Provide continuous learning opportunities and career development pathways to keep team members engaged and motivated.

**Use of the Mobile Crisis New Team Member Onboarding Checklist**

A structured onboarding checklist serves as a vital tool in supporting team members by outlining essential tasks, trainings, and key conversations. This checklist ensures that all necessary components of onboarding are addressed in a clear and organized manner. By utilizing a structured plan, supervisors can provide consistency, track progress, and identify any gaps in training. Additionally, adapting and expanding the checklist as needed allows for flexibility in meeting the unique needs of each team members member. Setting 30-day and 60-day benchmarks within the plan helps establish clear goals and expectations and fosters team members’ confidence, competency, and
long-term success within the mobile crisis team.

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 is comprised of the following sections:***

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1. **60-Day Training Plan**
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1. **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**

Pro-Tip: 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 are in the process of team integration. Engaging them by continually checking in and answering questions allows rapport to be established, anxiety to decrease, and reduces the possibility of them accepting another offer before the background check is complete.

| **Checkmark with solid fill** | **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: |  |
| **Notes** |  |  |
|  |

**First Day**

Pro-Tip: There is a lot of information to learn and many questions on 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.

| **Checkmark with solid fill** | **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
* 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
* Procurement request
* Request office items/tools
* Reporting time
* Access employee portal
* Use and troubleshoot work devices i.e. desk phone/mobile phone, tablet, computer
 |  |
| **Other** |  |  |
|  |  |  |
| **Notes** |  |  |
|  |

**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.

| **Checkmark with solid fill** | **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: |  |
| **Notes** |  |  |
|  |

**30-day Training Plan**

**Office Training**

Pro-Tip: Follow up is necessary after the 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 from continual learning, engagement, and honing their skills through feedback and supervision.

| **Checkmark with solid fill** | **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** |  |  |  |  |
|  |

**30-day Training Plan**

**Dispatch, Deployment, and Field Training**

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 upon. This allows supervisors to gauge knowledge and critical thinking skills and allows for team members to ask questions in a safe learning environment.

| **Checkmark with solid fill** | **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
 |  |
| **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 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 & 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
* 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**

Pro-Tip: 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. Shadowing roles may be reversed at this point, having the training officer shadow the work of the onboarding team members, offering feedback and tips.

| **Checkmark with solid fill** | **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**

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.

| **Checkmark with solid fill** | **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** |  |  |
|  |  |  |
| **Notes** |
|  |

**Self-Care and Team Member Wellness**

Pro-Tip: Crisis response is challenging and emotionally and physically draining. Continual monitoring and reminders to team members to prioritize their self-care and wellbeing is 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 balances to keep burnout at bay.

| **Checkmark with solid fill** | **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**

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 perspective provides 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.

| **Checkmark with solid fill** | **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** |  |  |
|  |  |  |
| **Notes** |  |  |
|  |

**Training Checkpoints**

**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, ensuring they align with agency standards while building 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.

| **Checkmark with solid fill** | **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
* Conducts follow-up calls to reassess safety risk post-crisis and ensure ongoing stability
 |  |
| **Additional Skills** |  |  |
|  | * Retrieves collateral info from multiple sources (medical chart, call records, etc.)
* 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 (APS, CPS, Schools, ER, CBO, PD, etc.)
 |  |
| **Other** |  |  |
|  |  |  |
| **Trainer Feedback** |  |  |
|  |

**Training Checkpoints**

**Field Response Expectations**

Pro-Tip: Reviewing expectations for new team members is vital and can support ongoing professional development for experienced team members. Quality checks help experienced team members stay aligned with evolving standards and processes, ensuring consistency across the team. Additionally, engaging in training and review processes can offer fresh perspectives, encouraging continuous learning.

| **Checkmark with solid fill** | **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.)
 |  |
| **Other** |  |  |
|  |  |  |
| **Trainer Feedback** |
|  |

**Training Checkpoints**

**Overall 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 values and expectations firsthand.

| **Checkmark with solid fill** | **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** |  |  |
|  |  |  |
| **Trainer Feedback** |
|  |

**Training Checkpoints**

**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.

| **Checkmark with solid fill** | **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** |  |  |
|  |

## **The Encounter Workflow**

The following visual was created in partnership with the San Francisco Department of Public Health. It highlights a workflow of 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 faster while allowing experienced staff to identify areas for improvement.

