



RECOMMENDED PEER ONBOARDING PROCEDURES
(not all may apply to volunteers)

PRE-SELECTION

- ☐ Review core competencies for peers working in behavioral health settings (<http://mhanca.org/wp-content/uploads/Core-Competencies-of-Peer-Support-Workers-1.pdf>)
- ☐ Review core competencies for agencies employing peers (<http://mhanca.org/wp-content/uploads/Core-Competencies-of-Peer-Employers.pdf>)
- ☐ Determine when and how peers will be utilized (CommonGround is one effective way to use peers in clinical settings <https://www.patdeegan.com/commonground>)
- ☐ Determine duties and activities peer will perform; create job description (if hiring peer employees)
- ☐ Prepare existing agency staff (information, WISE trainings, discussions, etc.)
- ☐ Identify onboarding and orientation process
- ☐ Develop and disseminate job/volunteer announcement and employment/volunteer applications
- ☐ Review applications and select interview candidates
- ☐ Convene a hiring panel and conduct interviews; select a candidate
- ☐ Check references and extend offer contingent upon outcome of background check
- ☐ Conduct background check and ensure applicant passes
 - Megan's law website (<http://www.meganslaw.ca.gov/disclaimer.aspx?lang=ENGLISH>)
 - Live Scan (<https://oag.ca.gov/fingerprints/locations>)
 - DMV history (if peer will be driving)

POST-SELECTION

- ☐ Confirm start date
- ☐ Review peer job description or volunteer activities; plan how responsibilities will be delegated, reporting structure, and communications procedures
- ☐ Notify team of hiring decision and start date; determine staff participation in onboarding process
- ☐ Make logistical preparations for onboarding
 - Schedule
 - Workspace
 - Computer access/email account
 - Telephone access
 - Building access (keys, badges, access codes, etc.) and parking
- ☐ Gather resources and materials relevant to position and prepare an orientation binder

W-I-S-E is a program of NorCal MHA funded by the California Mental Health Services Act (Prop 63) and administered by the Office of Statewide Health Planning and Development (OSHPD)



W·I·S·E

Workforce Integration Support and Education

a program of NorCal MHA

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POST-HIRE: FIRST 30 DAYS – ONBOARDING & ORIENTATION

- ☐ **DAY ONE:** Provide orientation binder and onboarding materials; complete necessary paperwork
 - Peer job description
 - Employee handbook and other agency policies/volunteer code of ethics
 - Direct deposit form
 - W-4 form
 - I-9 form (W-9 for volunteers)
 - Cultural competence statement
 - Sexual harassment brochure (<http://www.dfeh.ca.gov/res/docs/publications/DFEH-185.pdf>)
 - Payroll, timesheet, and holiday calendar
 - Staff roster/org chart (updated w/new hire info)
 - Benefits paperwork
 - Employee emergency contact form
- ☐ **DAY ONE:** Conduct agency-specific orientation, covering:
 - Organization's history, mission, vision, and values
 - Current services and programs and how peer role fits into existing structure
 - How things are done (important policies and procedures)
 - Who peer works with, reports to, how information is shared, how performance is evaluated
 - Data security protocols
 - Documentation and record-keeping requirements
- ☐ **DAY ONE:** Copy the following documents and keep on file with other necessary paperwork:
 - Driver license/government-issued ID
 - Social Security card/authorization to work info
 - Auto insurance policy (if driving)
 - DMV report
- ☐ **WEEK ONE:** Send peer to WISE Peer Orientation Program, which includes the following topics:
 - HIPAA Basics
 - MHSA Principles
 - Recovery 101
 - Group Facilitation 101
 - Peer Support 101
 - Ethics, Boundaries, and Confidentiality for Peer Support Workers
 - Advocating for Consumer/Family Member Services
 - Sexual Harassment/Workplace Bullying
 - Navigating Systems of Care
 - Local Services, Resources, and Supports

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WELLNESS • RECOVERY • RESILIENCE





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POST-HIRE: FIRST 90 DAYS AND BEYOND

- ☐ Conduct frequent (weekly, biweekly, or monthly) check-ins with peer to determine how things are going, explore potential issues, and prevent future problems. Questions for peer may include:
 - What do you like about the position and this agency?
 - What's going well?
 - What could be going better?
 - Do you have enough, too much, or too little to do?
 - What, if anything, do you not understand about your position or our agency?
 - Who do you talk to when you have questions about work? Do you feel comfortable asking?
 - Are we clearly communicating our expectations to you?
 - How are you getting along with your coworkers/non-peer staff?
 - How do you see yourself developing in this role?
 - What are your professional goals and how can we help you accomplish them?
- ☐ Conduct occasional check-ins with non-peer staff to determine how things are going, explore potential issues, and prevent future problems. Questions for non-peer staff may include:
 - Do you understand the peer role? What questions do you still have?
 - What's going well?
 - What could be going better?
 - How are you getting along with peer(s)?
- ☐ Enroll peer in additional WISE trainings:
 - WRAP Seminar I (intro to WRAP/prerequisite for Seminar II)
 - WRAP Seminar II (WRAP facilitator training)
 - Group Facilitation 102 (advanced facilitation skills for stakeholder/community meetings)
 - Social Support at Work (how coworkers can better support each other)
 - Managing Up (helping peers better communicate with supervisors)
 - Effective Goal Setting with Clients/Consumers
 - Self-Care and Self-Management for Peer Support Workers
 - Understanding Co-Occurring Disorders
 - Trauma-Informed Care
 - Mental Health First Aid/Crisis Intervention
 - Youth Mental Health First Aid/Crisis Intervention
 - Suicide Prevention in the Workplace
- ☐ Ensure peer has frequent contact with other peers to prevent cooptation and dilution of peer role
 - WISE holds regular peer staff conference calls and webinars (for peers to support, connect with, and learn from other peers about workplace issues) on the first Monday of each month from 3:00 pm – 4:00 pm
- ☐ Refer peer to WISE for individual mentoring, one-on-one job coaching, and professional development opportunities
 - For more info, contact Stephanie Ramos, WISE Program Coordinator, at 916.366.4600 or sramos@nocalmha.org

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