30 / 60 / 90-Day Onboarding & Stay Interview Packet

Manager & HR Implementation Guide for Pennsylvania Behavioral Health & I/DD Programs

Employee Name: _____ **Start Date:** _____

Role / Program Site: _____ **Supervisor / Peer Mentor:** _____

Part 1: 30 / 60 / 90-Day Onboarding & Integration Roadmap

Days 1–30: Compliance, Connection & Structured Shadowing

Objective: Eliminate clearance delays, establish team belonging, and prevent solo exposure to high-acuity shifts.

- ☐ **PA Regulatory Clearances:** Confirm final receipt of PA ChildLine, PSP Criminal Record, and FBI fingerprinting clearances in personnel file.
- ☐ **Core Mandatory Training:** Complete HIPAA, Mandated Reporter, CPR/First Aid, and PA ODP / OMHSAS regulatory orientation modules.
- ☐ **Paid Peer Mentor Assignment:** Pair new hire with a trained veteran Peer Mentor for all Weeks 1–2 floor shifts or client sessions.
- ☐ **Graduated Shadowing Schedule:** Complete 100% shadowed shifts in Weeks 1–2, moving to supervised co-delivery in Weeks 3–4.
- ☐ **EHR & Documentation Setup:** Provision system logins and review sample shift/progress notes to set clear documentation standards.
- ☐ **Day 30 Milestone:** Conduct the **30-Day Stay Interview** (Part 2) to verify schedule fit and resolve early friction points.

Days 31–60: Independent Practice & Micro-Credential Building

Objective: Build confidence in core daily routines while enrolling staff in certifications that unlock pay increases.

- ☐ **Core Shift / Caseload Ownership:** Transition to managing assigned residential shifts or a 50%–75% clinical caseload with weekly check-ins.
- ☐ **Pay-Ladder Certification Enrollment:** Enroll staff in first micro-credential course (e.g., PA ODP Medication Administration, Safety-Care, or CPI).
- ☐ **Clinical / Program Supervision:** Establish recurring supervision cadence, including logging hours toward PA LPC/LCSW licensure if applicable.
- ☐ **Interdisciplinary Team Integration:** Introduce staff to behavior specialists, program nurses, supports coordinators, and family contacts.
- ☐ **Day 60 Milestone:** Conduct the **60-Day Stay Interview** and complete a brief documentation quality audit to reinforce good habits.

Days 61–90: Full Autonomy, Pay Progression & Career Pathing

Objective: Solidify long-term retention by tying daily performance to tangible financial rewards and career growth.

- ☐ **Full Caseload / Shift Autonomy:** Transition to a full caseload or standard residential shift rotation with biweekly or monthly supervision.
- ☐ **First Pay-Ladder Step Increase:** Verify completion of initial certifications and submit HR payroll form for hourly wage bump (e.g., DSP I to II).
- ☐ **PA Loan Repayment Check:** Verify facility HPSA eligibility and assist eligible clinicians with PA Behavioral Health Loan Repayment applications.
- ☐ **90-Day Competency Sign-Off:** Complete formal probationary review evaluating client rapport, safety compliance, and team communication.
- ☐ **Day 90 Milestone:** Conduct the **90-Day Stay Interview** and map out a 6- to 12-month goal (e.g., Peer Mentor, Senior DSP, or Supervisor).

Part 2: 30 / 60 / 90-Day Stay Interview Guide & Worksheet

Instructions for Managers & HR: Schedule a 15- to 20-minute private conversation at Days 30, 60, and 90. Check milestone being conducted: ☐ **Day 30** ☐ **Day 60** ☐ **Day 90** | **Date:** _____

Manager Opening Script (Read or Paraphrase)

"We want to make sure this is a place where you feel supported and want to build a career. This isn't a performance evaluation—I'm here to listen and check in on how your first [30 / 60 / 90] days are going, what's working well for you, and what we can fix right now to make your job smoother."

Focus Area	Question to Ask & What to Listen For	Employee Feedback & Action Notes
1. Role Reality vs. Expectations	*"How does the day-to-day reality of this job compare to what you expected during your interview?"* Listen for: Reality shock around client acuity, personal care duties, or paperwork load.	
2. Schedule & Burnout Risk	*"How is your current shift schedule working for your life outside of work? Have you felt pressured to pick up extra hours?"* Listen for: Commute strain, childcare conflicts, or early burnout from short-staffing/overtime.	
3. Training & Safety Confidence	*"Was there a moment in the last few weeks where you felt unprepared or unsupported on the floor?"* Listen for: Gaps in de-escalation training, unclear emergency protocols, or insufficient shadowing.	
4. Supervisor & Team Dynamics	*"What is the best way for your supervisor to support you, and how are you connecting with your coworkers?"* Listen for: Friction with site leads, isolation on overnight/weekend shifts, or lack of feedback.	
5. Retention & Growth Hooks	*"What is one thing we could change tomorrow that would make your job better—and what skills or certifications do you want to earn next?"* Listen for: Quick operational fixes (supplies, EHR glitches) and readiness for pay-ladder promotions.	

Post-Interview Action Protocol ("The 48-Hour Rule")

- **Close the Loop Within 48 Hours:** Follow up with the employee within two business days to confirm at least one concrete adjustment made from their feedback (e.g., adjusting a shift start time, scheduling refresher training, or fixing equipment).
- **Escalate Flight Risks Immediately:** If an employee expresses severe overwhelm or mentions looking at outside jobs, notify HR the same day to arrange Peer Mentor support or temporary float-pool relief at their site.
- **Track Site-Level Trends:** Submit completed sheets to HR to identify recurring friction points (e.g., specific group homes with chronic call-offs or confusing documentation workflows).

48-Hour Action Item Committed: _____

Target Completion Date: _____

Interviewer Signature: _____

HR Review Initials / Date: _____