

Appendix 3

Sample Onboarding document

Name: _____ Date: _____

This document has been developed to support new staff members to be successful in their position in the Lived Experience (Peer) workforce team.

The support plan complements the (XXXXX HHS) Orientation Manual & Activity Checklist and will exist in conjunction with 1:1 conversations and operational and practice supervision until such time it is no longer needed.

The (XXXXX HHS) welcomes you and values your contribution to the workplace as a lived experience employee. Due to the nature of your employment and the environment, it is important to us that we support your success in this role.

Workplace orientation is an essential and valuable process where an employee is introduced to their role, co-workers and work environment. You will be provided with a clear understanding of your responsibilities, what is expected of you in your new role and how your contributions fit into the overall objectives of the division and HHS. We will gain a deeper understanding of you and your learning style, identify specific areas of interest and learning or support needs that you may have.

You will receive a large of amount of information and training (written and verbal) and be introduced to many new terms, processes, concepts and people during your first few months in the role. We understand this can be overwhelming and will take time to absorb and put it into context.

While we have endeavoured to include as much as possible to support you in your new role, we encourage you to actively ask questions and clarify anything that is unclear.

Please note: This is a working document to be further developed with you during your onboarding period.

Week 1

- ☐ Provide orientation of role and facilities
 - Introductions & workstation set up (inc. key contacts)
 - General Evacuation / Defibrillator location and use
 - Background and status of lived experience workforce
 - Introduction to Peer Worker competencies / scope / expectations
 - Facility Orientation / Parking / transport
- ☐ Establish expectation regarding sharing of narrative: when, where, how, and why
- ☐ General workplace processes – information and expectations:
 - Buddy Board
 - Team huddles, meetings and planning days
 - Supervision (Operational & Practice)
 - Diary & time management
 - HR Forms, Processes & Timeframes (planned & emergent leave)
 - Streamline Introduction/Set up
 - QHEPS Introduction
 - RMS Introduction (room & vehicle bookings, log sheets)
 - MHAODS Escalation Pathway
 - Online Training Platforms Introduction (access, requirements & timeframes)
 - Compliments, complaints and suggestions
 - Ryan's Rule & Client Care Escalation Process in CMH
- ☐ Establish weekly catch-up with Peer Team Leader (4 weeks – commencing week 2, then fortnightly with revision of plan at 3 months) to revisit and discuss:
 - Peer worker competencies, scope and expectations
 - Professional boundaries, dual relationships and conflict of interest
 - Importance of self-care including taking breaks and scheduling regular leave
 - Leave request / notification process
 - Identify possible mentors/supervisors
 - Identify additional training/support needs
 - Sharing of narrative
 - CIMHA documentation
 - Recovery focussed language
- ☐ Development of Outlook Calendar
 - Signature, sharing & invites (training days, weekly 1:1, operational supervision and team huddles / meetings)
- ☐ Provide information related to QH support initiatives and programs i.e., EAP, Stigma, LGBTIQ+ Network, and Workplace Wellbeing Plan
- ☐ Facilitate opportunity to commence mandatory training and schedule monthly operational supervision

- ☐ Director & Program Manager introduction
- ☐ Confirm Cert IV Status (certificate or enrolment confirmation)
- ☐ Mental Health Orientation (schedule)
- ☐ Brook Red Sharing Lived Experience (schedule)
- ☐ MHHS Orientation (schedule)
- ☐ MHHS Cultural Awareness (schedule)
- ☐ CIMHA Training (Schedule)
- ☐ ieMR Training (Schedule)
- ☐ MAYBO (schedule)

Notes

Week 2

- ☐ Complete first 1:1 conversation
- ☐ Attend to mandatory training
- ☐ Attend to scheduled training
- ☐ Introduction to PDP (schedule initial for end of week 4)
- ☐ Boundaries (personal & professional) identification of steps to avoid being placed in those situations
- ☐ 16 Personalities Activity – tool to help us better understand each other, get the best from each other and communicate effectively

[Free Personality Test | 16Personalities](#)

- ☐ CIMHA training with a focus on
 - Peer Worker Documentation (referrals, notes & recovery plans)
 - POS and NCRA
- ☐ Team Days with buddy
 - ACT
 - CCT
- ☐ Documenting in CIMHA training environment (scenarios & shadowing)
- ☐ Documentation review

Notes

Week 3

- ☐ Complete second 1:1 conversation
- ☐ Attend to mandatory training
- ☐ Attend to scheduled training
- ☐ Establish purpose of meeting/s and groups (client & organisational) and expectation of peer role in these forums
- ☐ Provide understanding and insight into key areas of the Peer Work Framework, how this is used within the peer role and how it is embedded into service delivery
- ☐ Team Days with buddy
 - CYMHS
 - OPMH
 - MIRT & EP
- ☐ Documenting in CIMHA training environment (scenarios & shadowing)
- ☐ Documentation review/discussion

Notes

Week 4

- ☐ Complete third 1:1 conversation
- ☐ Attend to mandatory training
- ☐ Attend to scheduled training
- ☐ Introduction to operational supervision (process, report, schedule)
- ☐ PPD – initial
- ☐ ieMR introduction (read only)
- ☐ CIMHA
 - Commence with providing progress notes via email to Peer Team Leader for inclusion into CIMHA with view to provide additional training in CIMHA note entering
- ☐ Continue to develop understanding of Peer worker competencies, scope and expectations
- ☐ Review the onboarding/support plan and determine ongoing plan to support if required
- ☐ Peer Work competencies/scope discussion - sign off or determine ongoing plan to support

Notes