DSP ONBOARDING CHECKLIST

# The first 90 days

One copy per new direct support professional. Work down each phase: the person who leads an item initials and dates it when it is done. Before you use it, your organization writes its own required items into the blank rows at the end of each phase.

| | | | |
|---|---|---|---|
| **New DSP** | | **Role** | |
| **Program or site** | | **Start date** | |
| **Supervisor** | | **Mentor** | |

Due dates: day one is the first shift; the tracker spreadsheet works out week one and days 30, 60 and 90 from the start date.

## 1. Before day one (from hiring to the first shift)

*Set the new DSP up to arrive expected, with an honest picture of the job and a person to turn to.*

| ✓ | Item | Who leads | Due | Done (initials, date) |
|---|---|---|---|---|
| ☐ | Give a realistic job preview during hiring, best after the offer and before the person accepts: the good and the hard parts of the work, from a DSP who does it, a visit, or a written preview, with time for questions. | Supervisor | | |
| ☐ | Choose a mentor who works the same site and shifts, and tell them before the first day. | Supervisor | | |
| ☐ | Put shadow shifts with an experienced DSP on the first week's schedule, so the first shift is not worked alone. | Supervisor | | |
| ☐ | Send a welcome note with the first week's schedule: where and when to arrive, who will meet them, and what to bring. | Supervisor | | |
| ☐ | Tell the team, and the people supported in the way each prefers, that a new DSP is starting and when. | Supervisor | | |
| ☐ | *Your organization's required items before the first shift (written in by your organization)* | | | |
| ☐ | *Your organization's required item* | | | |
| ☐ | *Your organization's required item* | | | |

**Where this comes from:** Larson, O'Nell and Sauer (RTC); CMS DSW Promising Practices, 2006; Larson, Frontline Initiative, 1996; NCI-IDD State of the Workforce, 2024; ICI Impact, 2007/2008; Haskin, Frontline Initiative, 2000; Hewitt, Larson, O'Nell and Sauer (RTC). ICI's list of agency workforce challenges includes "New hires quit in the first 3-6 months." An RJP "includes information on both the positive and the negative aspects of the job" (Larson, O'Nell and Sauer); in 2024, 80.4% of responding agencies offered one (NCI-IDD). A meta-analysis reported in a CMS-funded review found that RJPs "delivered after a job offer has been made, but before an applicant decides whether to accept a position, are more effective in reducing turnover than those conducted before a job offer or after hire" (CMS DSW Promising Practices). For group homes, an RJP should address "relationships with co-workers or supervisors, opportunities to do fun things, pay and benefits, hours and scheduling practices" and the harder parts of the work (Larson, 1996). Mentors "are typically paired with those employees they will be working with in the same work areas" (Haskin). "Many people work their first shift without any co-worker or FLS present" (Hewitt and others; FLS is the front-line supervisor). The welcome note, and pairing on the same shifts, are ours.

## 2. Day one (the first day)

*Welcome first. By the end of the day the new DSP knows the place, the people, the basics of safety and whom to call.*

| ✓ | Item | Who leads | Due | Done (initials, date) |
|---|---|---|---|---|
| ☐ | The supervisor welcomes the new DSP in person and shows them the home or program: exits, the schedule, where plans and records are kept. | Supervisor | | |
| ☐ | Meet the people they will support, in the way each person prefers, and the coworkers on shift. | Supervisor | | |
| ☐ | Our mission and values, and the NADSP Code of Ethics: what we expect of a DSP here, and why. | Training lead or HR | | |
| ☐ | Safety basics for this site: emergency numbers, who to call, and where each person's crisis plan is kept. | Supervisor | | |
| ☐ | Meet the mentor, and agree how and when to reach them. | Mentor | | |
| ☐ | A five-minute check-in at the end of the day (questions below). | Supervisor | | |
| ☐ | *Your organization's required day-one items (written in by your organization)* | | | |
| ☐ | *Your organization's required item* | | | |
| ☐ | *Your organization's required item* | | | |

Free tools for this phase: NADSP Code of Ethics onboarding guide, crisis plan template

**Where this comes from:** Hewitt, Larson, O'Nell and Sauer (RTC); NADSP Code of Ethics; Haskin, Frontline Initiative, 2000; Hewitt, LaLiberte, Kougl-Lindstrom and Larson (RTC). "Opportunities for new employees to meet supervisors, co-workers, and people receiving services in a friendly and calm atmosphere are important during orientation," and "By the end of the first day, the employee should have a strong sense that he or she has made the right choice in taking the job" (Hewitt and others). The NADSP Code of Ethics sets out the ethics of direct support. "Developing mentors who can support, train, and develop DSPs can be a tremendous help to supervisors" (Hewitt, LaLiberte, Kougl-Lindstrom and Larson).

## 3. First week (days 2 to 7)

*Learn by watching, then helping, with an experienced DSP beside them, a few topics a day.*

| ✓ | Item | Who leads | Due | Done (initials, date) |
|---|---|---|---|---|
| ☐ | Shadow shifts: watch an experienced DSP, then help, then lead parts of the routine with the DSP beside them. | Coworker on shift | | |
| ☐ | Read each person's plan with the supervisor: what matters to them, how they communicate, and the goals in their plan. | Supervisor | | |
| ☐ | Practice the daily note and the incident report on a real shift, with the supervisor or mentor reading the first ones. | Mentor | | |
| ☐ | Pace the information: a few topics a day, not everything at once. | Training lead or HR | | |
| ☐ | Talk honestly about the hard parts of the job and how experienced coworkers handle them. | Mentor | | |
| ☐ | End-of-week check-in with the supervisor (questions below). | Supervisor and new DSP | | |
| ☐ | *Any training your state or organization requires before a DSP works without a coworker present (written in by your organization)* | | | |
| ☐ | *Your organization's required item* | | | |
| ☐ | *Your organization's required item* | | | |

Free tools for this phase: DSP daily notes template, DSP incident report template

**Where this comes from:** Hewitt, Larson, O'Nell and Sauer (RTC); Haskin, Frontline Initiative, 2000; NADSP Competency Areas; CMS DSW Core Competencies, 2014; Minnesota Statutes 245D.09. "New DSPs can understand their role by observing co-workers," and "Pacing the information provided during orientation can also help to reduce the likelihood that a new employee will become overwhelmed" (Hewitt and others). NADSP Area 12: the DSP "is aware of the requirements for documentation in his or her organization." In Minnesota, for example, for providers licensed under its chapter 245D, staff are instructed on each person's plan "Before having unsupervised direct contact with a person served by the program" (Minnesota Statutes 245D.09, subd. 4a). That is Minnesota's rule; write in your own state's.

## 4. Days 8 to 30 (the first month)

*More of each shift is led by the new DSP, with support on site, and the first competency observations.*

| ✓ | Item | Who leads | Due | Done (initials, date) |
|---|---|---|---|---|
| ☐ | Supervised shifts: the new DSP leads more of each shift, with a coworker or the supervisor on site. | Supervisor | | |
| ☐ | Competency observation 1 in weeks 1 to 2, and observation 2 by day 30, with the DSP competency checklist. | Supervisor | | |
| ☐ | A weekly mentor meeting: what went well, what was hard, one thing to try next. | Mentor and new DSP | | |
| ☐ | Agree with the supervisor when the DSP is ready to work a shift without a coworker present, under your organization's policy and any state rule that applies. | Supervisor and new DSP | | |
| ☐ | Add the new DSP to your annual training plan. | Training lead or HR | | |
| ☐ | Day-30 check-in with the supervisor (questions below). | Supervisor and new DSP | | |
| ☐ | *Your organization's required items by day 30 (written in by your organization)* | | | |
| ☐ | *Your organization's required item* | | | |
| ☐ | *Your organization's required item* | | | |

Free tools for this phase: DSP competency observation checklist, DSP annual training plan template

**Where this comes from:** Hewitt, Larson, O'Nell and Sauer (RTC); NADSP Competency Areas; CMS DSW Core Competencies, 2014; Haskin, Frontline Initiative, 2000; Bogenschutz, Nord and Hewitt, 2015. "By 30 days after hire, the employee should have a defined sense of commitment to the job and the organization" (Hewitt and others). The mentor "uses feedback forms to assess specific skills demonstrated by the new employee" (Haskin). In a randomized study, sites whose DSPs received competency-based training "experienced a significant decrease in annual turnover" (Bogenschutz, Nord and Hewitt). Bogenschutz, Nord and Hewitt tested competency-based training, not observations. The observation schedule, the weekly mentor meeting, the readiness item and the training-plan item are ours.

## 5. Days 31 to 60 (the second month)

*Feedback in both directions, one area to grow, and connections beyond the first team.*

| ✓ | Item | Who leads | Due | Done (initials, date) |
|---|---|---|---|---|
| ☐ | Competency observation 3 by day 60: the new DSP picks one area to grow. | Supervisor | | |
| ☐ | Ask for feedback from coworkers and, where they wish, the people supported. | Supervisor | | |
| ☐ | The new DSP gives feedback on the mentoring, too. | New DSP | | |
| ☐ | Connect the new DSP with other DSPs: a team meeting, a peer group or a DSP association. | Supervisor | | |
| ☐ | Day-60 check-in with the supervisor (questions below). | Supervisor and new DSP | | |
| ☐ | *Your organization's required items by day 60 (written in by your organization)* | | | |
| ☐ | *Your organization's required item* | | | |
| ☐ | *Your organization's required item* | | | |

Free tools for this phase: DSP competency observation checklist

**Where this comes from:** NADSP Competency Areas; CMS DSW Core Competencies, 2014; Haskin, Frontline Initiative, 2000; Hewitt, Larson, O'Nell and Sauer (RTC). CMS lists "Seeks feedback from many sources" as a skill; in Haskin's program "the new employee provides an evaluation of the mentor's instruction"; "DSPs at all phases of their employment need opportunities to network and to learn from one another" (Hewitt and others). The observation schedule is ours.

## 6. Days 61 to 90 (the third month)

*Review the first 90 days together and agree on what comes next.*

| ✓ | Item | Who leads | Due | Done (initials, date) |
|---|---|---|---|---|
| ☐ | 90-day review: lay the three observations side by side, name the strengths, and agree on a learning plan for the next quarter. | Supervisor and new DSP | | |
| ☐ | Talk about what comes next: a credential, a career path, or becoming a mentor. | Supervisor | | |
| ☐ | Close the mentor pairing, or keep it going if both wish, and thank the mentor. | Supervisor | | |
| ☐ | Record whether each new DSP is still with you at 90 days and at 6 months, to see how onboarding is working. | Training lead or HR | | |
| ☐ | Day-90 check-in (questions below). | Supervisor and new DSP | | |
| ☐ | *Your organization's required items by day 90 (written in by your organization)* | | | |
| ☐ | *Your organization's required item* | | | |
| ☐ | *Your organization's required item* | | | |

Free tools for this phase: DSP competency observation checklist, DSP turnover cost calculator

**Where this comes from:** NADSP Competency Areas; NCI-IDD State of the Workforce, 2024; Larson, O'Nell and Sauer (RTC). NADSP Area 7 covers education, training and self-development; in 2024, 32.6% of responding agencies had a DSP ladder to retain workers in DSP roles (NCI-IDD). To see whether a realistic job preview is working, Larson, O'Nell and Sauer suggest tracking "What percentage of newly hired DSPs remain with the organization (or site) at least 6 months?"; the 90-day mark is ours.

SUPERVISOR AND NEW DSP

# The five check-ins

The questions are ours, built on the research that, after peers, "supervisors were rated by new employees as the most available and most helpful sources" of information about the job, and that orientation should "Provide realistic information about job stresses" (Hewitt and others).

## End of day one (Supervisor, 5 minutes)

| | |
|---|---|
| **How did today go?** | |
| **What questions do you have?** | |
| **Do you know who to call on your next shift, and how?** | |
| **Agreed next step, who and by when** | |

## End of week one (Supervisor, 15 minutes)

| | |
|---|---|
| **What has surprised you so far?** | |
| **What is harder than you expected, and what has helped?** | |
| **Do you know each person's plan and how they communicate?** | |
| **What do you need before your next shift?** | |
| **Agreed next step, who and by when** | |

## Day 30 (Supervisor, 20 minutes)

| | |
|---|---|
| **Is the job what you expected from the preview? What is different?** | |
| **Do you feel ready to work a shift without a coworker present? What would help?** | |
| **How is the mentoring going?** | |
| **Agreed next step, who and by when** | |

## Day 60 (Supervisor, 20 minutes)

| | |
|---|---|
| **Which competency area do you want to grow in?** | |
| **What feedback have you had, and what have you tried?** | |
| **What would make you more likely to stay with us?** | |
| **Agreed next step, who and by when** | |

## Day 90 (Supervisor, 30 minutes)

| | |
|---|---|
| **What are your strengths, in your words and ours?** | |
| **What goes on your learning plan for the next quarter?** | |
| **Where would you like to be in a year?** | |
| **Agreed next step, who and by when** | |

## From shadow to solo: four steps for each routine

Ours, built on Hewitt and others (RTC) and Haskin. Use it for each routine the new DSP learns: mornings, meals, medication support where your rules allow, community outings, documentation.

| Step | What it looks like | Routine | Date reached |
|---|---|---|---|
| **Watch** | The new DSP watches an experienced DSP do the routine and asks questions after. | | |
| **Help** | The new DSP does parts of it, with the experienced DSP leading. | | |
| **Lead, with support** | The new DSP leads it, with the experienced DSP beside them and feedback after. | | |
| **On their own** | When the supervisor and the new DSP agree they are ready, under your policy and any state rule that applies. | | |

## For training leads: set it up in five steps

1. **Write in your required items first.** Open any state rules for each service you provide, your licensing or waiver requirements and your own policies. Write what a new DSP must complete, and by when, into the blank rows at the end of each phase: in the Word form, on the spreadsheet's Checklist items sheet, or on a printed master copy. We leave those rows blank on purpose: they differ by state, by service and by agency. Save it as your agency's master copy.
2. **Name the people.** For each new DSP, write in the supervisor and a mentor who works the same site and shifts, and tell the mentor before day one. Use a fresh copy of the checklist for each new DSP.
3. **Set the dates.** Enter each new DSP's start date in the tracker spreadsheet. It works out the check-in dates for the end of week one and days 30, 60 and 90; enter the date each one is done and it shows what is due next. The day-one check-in is on the paper checklist.
4. **Sign off as you go.** The person who leads each item initials and dates it when it is done. Run the five check-ins on time, even when the week is busy.

5. **Look at what happened.** Every quarter, count how many new DSPs are still with you at 90 days and at 6 months, and ask the people who stayed and the people who left what helped. Change the checklist where it did not.

## Where each phase comes from

Read November 15, 2026. The phase plan, the item wording, the check-in questions and the shadow-to-solo steps are Special Learning's; the quoted lines are as published. None of these organizations has reviewed or endorsed this checklist. The fillable Word version and the tracker spreadsheet are at the web address at the foot of each page.


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6. **Larson, Frontline Initiative, 1996.** Sheryl Larson, "Influencing Direct Support Worker Retention," Frontline Initiative, Volume 1, Number 1 (1996), Institute on Community Integration, University of Minnesota. https://publications.ici.umn.edu/frontline-initiative/1-1/influencing-direct-support-worker-retention
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11. **CMS DSW Core Competencies, 2014.** Centers for Medicare & Medicaid Services, National Direct Service Workforce Resource Center, Direct Service Workforce Core Competencies, Final Competency Set, December 2014. https://www.medicaid.gov/sites/default/files/2019-12/dsw-core-competencies-final-set-2014.pdf
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13. **Minnesota Statutes 245D.09.** Minnesota Statutes 2026, section 245D.09, Staffing Standards, subdivisions 4 (Orientation to program requirements) and 4a (Orientation to individual service recipient needs), Office of the Revisor of Statutes. https://www.revisor.mn.gov/statutes/cite/245D.09


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