FREE CHECKLIST

The crisis management starter checklist

Sources (Read November 15, 2026. Figures and rules are quoted as published; the checklist wording is ours.) [1] Occupational Safety and Health Administration, *Guidelines for Preventing Workplace Violence for Healthcare and Social Service Workers*, OSHA 3148-06R, 2016. https://www.osha.gov/sites/default/files/publications/osha3148.pdf [2] National Alliance for Direct Support Professionals (NADSP), Competency Areas, area 10: Crisis Prevention and Intervention. https://nadsp.org/resources/competency-areas/ [3] 42 CFR 483.430(e), Intermediate care facilities for individuals with intellectual disabilities (ICF/IID): staff training program. https://www.ecfr.gov/current/title-42/section-483.430 [4] 42 CFR 483.450, ICF/IID: client behavior and facility practices. https://www.ecfr.gov/current/title-42/section-483.450 [5] 42 CFR 441.301(c)(4), Home and community-based services: settings requirements and plan modifications. https://www.ecfr.gov/current/title-42/section-441.301

Tick each item as it is in place.

1. Commit and involve staff

OSHA: management commitment and worker participation. Leadership support and frontline involvement come first (OSHA, 2016, section 1).

- ☐ Leadership states the policy and its goals, and puts the program in writing as part of your safety and health program.
- ☐ Someone is given responsibility and authority for the program, with the time and resources to run it.
- ☐ Senior managers, supervisors and DSPs or other frontline workers take part. Frontline staff name the daily tasks they feel put them most at risk.
- ☐ Staff can report incidents and near misses with no reprisal for reporting in good faith.
- ☐ The people you support help shape the policy where they can. In an ICF/IID this is required "to the extent possible." (42 CFR 483.450(a)(2))

2. Look at your worksite

OSHA: worksite analysis. Find what puts staff at risk, using records, procedures, surveys and a security review (OSHA, 2016, section 2).

- ☐ Review your incident reports, injuries and near misses.
- ☐ Review the procedures for different jobs, and run a short staff survey.
- ☐ Review security: how staff call for help, alarms, and safe rooms where staff can find shelter.
- ☐ Set how often to repeat it. OSHA's example: a full review every year, and a look after every incident or near miss.

3. Prevent and plan

OSHA: hazard prevention and control. Write down your agency's policies: how staff get help, who decides, and where each person's own plan takes over (OSHA, 2016, sections 3 and 4).

- ☐ If you run an ICF/IID: written policies must specify the interventions the facility approves, set them on a hierarchy from most positive or least intrusive to least positive or most intrusive, address which staff members may authorize them, and include a way to monitor and control their use. (42 CFR 483.450(b)(1))
- ☐ In home and community-based settings, each person has the right to "freedom from coercion and restraint." (42 CFR 441.301(c)(4)(iii))
- ☐ Where a provider-owned or controlled residential setting modifies one of the additional conditions in 441.301(c)(4)(vi)(A) to (D), the modification must be supported by a specific assessed need and justified in the person-centered service plan, with the positive supports used first, the person's informed consent and regular review of data. (42 CFR 441.301(c)(4)(vi)(F))
- ☐ Each person whose plan includes crisis supports has that plan where the staff who support them can use it, written by the clinician or team responsible for it. (Our recommendation.)
- ☐ A standard response plan for violent situations: how staff get help, how alarms work, and how staff communicate. (OSHA, 2016, section 4)
- ☐ Care for staff after an incident: first aid, medical care, and counseling or an employee assistance program. (OSHA, 2016, section 3)

4. Train everyone

OSHA: safety and health training. NADSP also lists crisis prevention and intervention as a DSP competency area (NADSP).

- ☐ New and reassigned staff have an orientation before they start their duties. Every worker is trained every year; in high-risk settings, refreshers may be needed perhaps monthly or quarterly. (OSHA, 2016, section 4)
- ☐ Training includes role-play, simulations and drills. (OSHA, 2016, section 4)
- ☐ DSPs learn the NADSP crisis skills: identify the crisis, defuse the situation, choose an intervention strategy and contact supports; then keep monitoring, discuss the incident, adjust supports and the environment, and report. (NADSP, area 10)
- ☐ Staff train on each person's own plan. In an ICF/IID, staff "must be able to demonstrate the skills and techniques" to carry out interventions and each person's program plan. (42 CFR 483.430(e)(3) to (4))
- ☐ Supervisors are trained to recognize high-risk situations and to encourage staff to report incidents and get care. (OSHA, 2016, section 4)

5. Record and review

OSHA: recordkeeping and program evaluation. Learn from each incident, then improve the program (OSHA, 2016, sections 3 and 5).

- ☐ After an incident: first aid and emergency care for injured staff first, then find the root cause.
- ☐ Discuss the incident with authorized staff and the person supported, as that person's plan and team direct. Adjust supports and the environment, and report as regulations require. (NADSP, area 10)
- ☐ Keep records of incidents, injuries, corrective actions and training.
- ☐ At least once a year, review the training's content, methods and frequency, using interviews, testing and observation.

One next step: Level 1 ABA Online Training Course for groups. $99 per learner · One-time purchase · Each learner has 12 weeks of access from the day they activate their code · Free 7-day trial of the first 2 sessions.