RELIAS WEBINAR FOR BEHAVIORAL HEALTH NEWS READERS

The Secret to Staff Retention Starts Before Day One

An Employee Operating System for behavioral health teams

Thursday, November 19, 2026 · 2:00–3:00 p.m. ET · Zoom

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Learning objectives

Onboarding and readiness

Accelerate onboarding and workforce readiness with personalized learning and competency-based development

Compliance and risk

Simplify compliance and reduce risk through connected workforce management tools

Engagement and retention

Improve engagement and retention by supporting continuous growth throughout the employee lifecycle

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Where does a new hire lose momentum?

Think about your own team. Where does the experience become inconsistent?

A. Offer accepted to first shift

B. First two weeks on the job

C. Day 15 through day 90

D. After 90 days

E. We haven’t measured it

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Hiring pressure

50,500

Projected U.S. openings per year for substance abuse, behavioral disorder, and mental health counselors, 2025–35.

48%

Of surveyed behavioral health workers considered other employment options because of workforce shortages.

1.46×

The average odds of staying for newcomers in structured onboarding programs versus comparison groups across 83 field studies.

BLS 2025–35 projections
National Council/Harris Poll, 2023
Liu et al., 2024

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Build an Employee Operating System

Six components to build for one role at one site.

Role expectations

Define what ready looks like for the role.

Ownership

Name who owns each handoff and who backs them up.

Workflows

Write the critical steps people follow.

Training and evidence

Teach the task and record how staff perform it.

Staff feedback

Ask where the process gets in the way.

Review and action

Use weekly measures and assign improvements.

Inspired by the Entrepreneurial Operating System (EOS) from EOS Worldwide.

Follow the AIT model

Adapt the Administrator-in-Training model for cross-department onboarding.

Name a mentor	Have one person plan the experience, make introductions, and check progress.
Schedule shadowing	Book short rotations with intake, clinical services, and quality. Give each visit a learning goal.
Connect the handoffs	Debrief with the mentor. Have the employee trace one referral and explain what each team needs.

Put the mentor, rotations, and debrief on the onboarding calendar.

Adapted from the nursing home Administrator-in-Training model.

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Build a one-page map for the first 90 days

Before day one

Explain the first shift and confirm access, coverage, and a backup.

First week

Shadow the work, practice a task, and hold the first check-in.

By day 30

Verify readiness and adjust the caseload or support.

By day 90

Review progress and agree on a development goal.

For each milestone, record the owner, deadline, and evidence of completion.

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Assign ownership before day one

HR	Confirms start dates and alerts the site to changes.
IT	Provisions and verifies access.
Clinical educator	Sets up learning and practice for the role.
Site supervisor	Owns the completed handoff and names a backup.

Before day one, confirm the schedule, access, buddy, and backup.

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What assessments can tell you

Personality and work style	Identify relevant tendencies, such as how someone collaborates or responds to change.
Job fit	Compare results with the role's actual demands, such as documentation and handoffs.
Situational awareness	Use a realistic scenario to see what cues the person notices and what information they seek.
Judgment and critical thinking	Ask what they would prioritize, when they would escalate, and why.

Use job-related results to inform selection, onboarding, and coaching.

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Required policy defines what staff must do

Expectation	Designated staff complete and review each discharge summary.
Accountability	The policy names who prepares, reviews, and signs within their role.
Review	The policy owner reviews it when requirements or the workflow change.

Example policy for a psychiatric hospital.

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Procedure makes the work repeatable

Open the template

Find the current discharge summary template.

Check the chart

Confirm the required information and aftercare plan.

Route for review

Send the draft to the approved reviewer and resolve any gaps.

Put the current procedure where staff do the work.

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Required training teaches the procedure

Common requirements

- Site policies and procedures
- Required training by role and site
- Due dates and required evidence

Personalized practice

- Tailor practice to experience and role
- Practice tasks from the role
- Plan who observes and how they sign off

Build the plan around the work the employee will actually perform.

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Competency is performance of the whole task

Observe	Ask the employee to complete and route a simulated discharge summary within their role.
Find the knowledge gap	Check the summary against the chart. Ask what belongs in the missing section and why.
Record the decision	Record the gap and identify which skill to check.

Example gap · The employee omits the patient's condition at discharge.

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Skill checks pinpoint what needs practice

Target the gap	Ask the employee to find the discharge condition in a simulated chart.
Check the skill	Have them summarize the condition accurately in the right section.
Record the result	Document whether they can find the information and write the summary.

Use a short task that isolates the skill you need to verify.

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Retrain on the gap and reassess

Coach the gap	Show how to find and summarize the discharge condition.
Practice again	Have the employee repeat the skill with a fresh simulated chart.
Reassess the task	Recheck the full workflow and document the decision.

Record the follow-up date and the evidence of improvement.

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Map every step to the regulation

Applicable regulation	The psychiatric hospital discharge summary covers the stay, discharge condition, and follow-up or aftercare.
Policy and procedure	Link the requirement to the policy, discharge steps, and template.
Training and evidence	Link required training, competency criteria, skill checks, and retraining records to the same requirement.

Example source · 42 CFR § 482.61(e), psychiatric hospital discharge summaries.

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How the workflow fits into EOS

Accountability Chart	Name who owns the workflow, reviews regulatory changes, and verifies staff readiness.
Process	Connect policy, procedures, training, assessment, and retraining to the applicable regulation.
Weekly Scorecard	Track a measure such as overdue sign-offs and review it alongside staff feedback.
Issues and Traction	Use IDS to solve recurring gaps. Assign a To-Do or a quarterly Rock to make the change.

When a requirement changes, update the policy, procedure, and training together.

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Quality surveying is the connective tissue

Survey and listen	Gather staff and patient feedback, internal review findings, and applicable external survey findings.
Compare with the work	Trace one issue through the policy, procedure, training, and evidence of what happened.
Assign a corrective action	Give the action an owner, due date, and a measure the team can review.
Recheck and report back	See whether the change worked and share the result with the people who raised the issue.

Example · Trace a missed discharge handoff from survey feedback to a verified fix.

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Safe reporting for incidents and grievances

Make reporting safe	Welcome reports of incidents and near misses. Protect privacy and guard against retaliation.
Use the right channel	Record safety events in the incident process. Route patient or family grievances to the grievance process.
Review and act	Acknowledge the concern, assess urgency, and give the follow-up an owner and due date.
Close the loop	Share what changed as appropriate and check whether the problem recurs.

Bring de-identified patterns to the weekly EOS meeting for action.

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Ask staff where the system breaks down

Example pulse survey at days 7, 30, and 90.

Clarity	I know what I'm expected to do and who to ask for help.
Practice and support	I've had enough practice and feedback for the work I'm assigned.
Time to do the work	I have time for documentation and supervision.
Open question	What one change would help you do the work this week?

Share the themes, assign one action, and tell staff what changed.

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Keep development going after onboarding

Choose a goal	Agree on one role-relevant skill the employee wants to develop.
Make room to practice	Set aside supervised practice time and name who gives feedback.
Review progress	Use the next supervision meeting to review evidence and agree on the next opportunity.

Review 90-day retention by hire cohort and ask staff what still gets in the way.

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Four weeks on the onboarding Scorecard

Weekly measure	Owner	Goal	W1	W2	W3	W4
Starts ready	HR lead	All	2/2	**1/2**	N/A	**1/2**
Check-ins on time	Site supervisor	All	2/2	2/2	1/1	**1/2**
Observations overdue	Clinical educator	0	0	0	**1**	**1**

Missed readiness targets in weeks 2 and 4 point to a recurring issue.

Illustrative data. N/A means no one started that week.

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Turn the weekly meeting into action

Bring one signal	The Scorecard shows late check-ins. Staff report repeat cancellations.
Identify the cause	Ask what happens when the supervisor is pulled away. The site has no backup.
Assign the fix	Give the site supervisor a To-Do to name backup coverage this week.
Check it next week	Verify whether check-ins happened and tell staff what changed.

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How Relias can support the workflow

Assign by role

Use role-based learning plans for onboarding and recurring requirements.

Identify development needs

Use available behavioral health assessments and targeted learning to inform coaching.

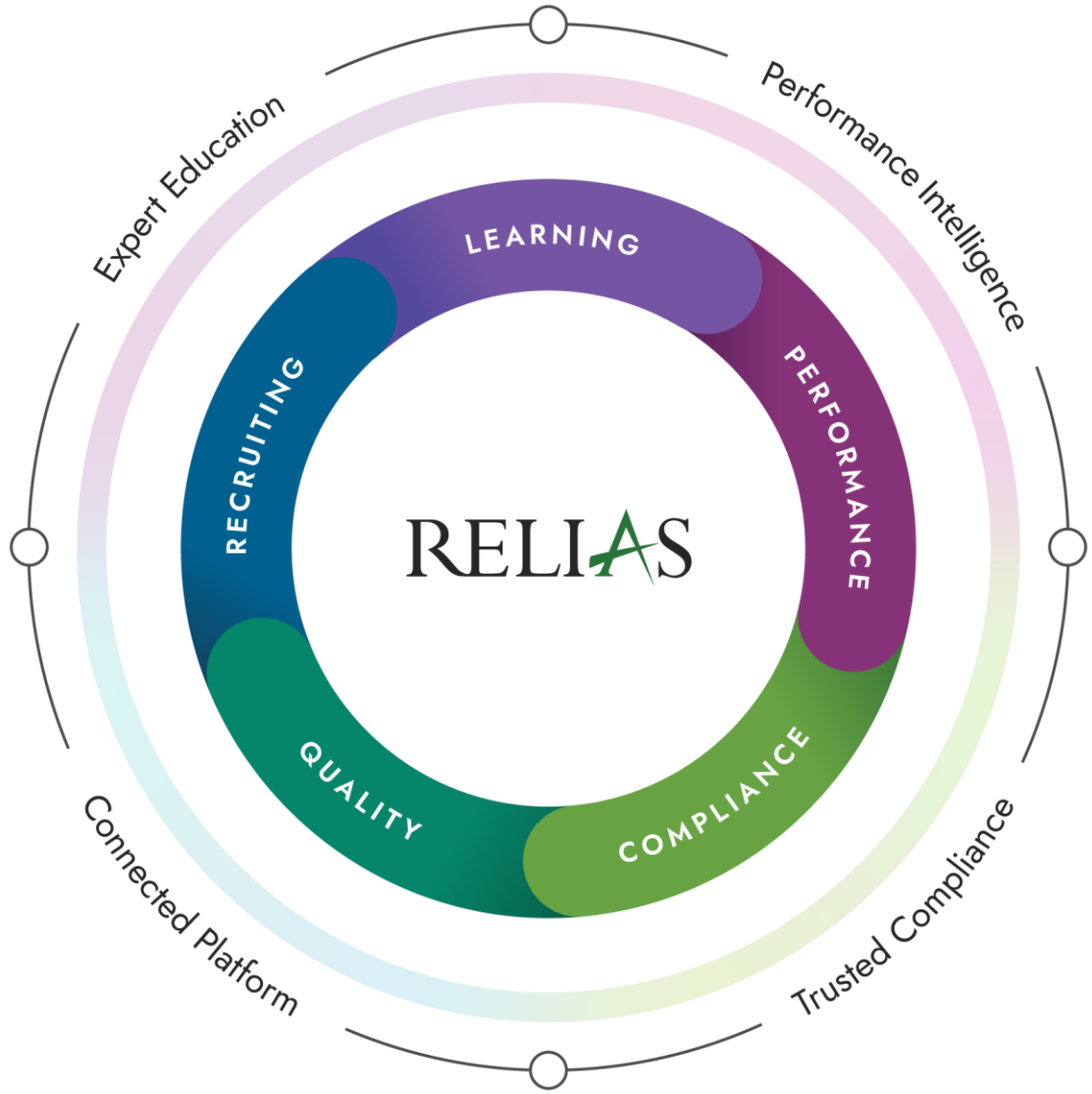
Review the exceptions

Use reporting to surface incomplete or overdue training for follow-up.

Carry it into supervision

Review the evidence with the employee and schedule the next action.

Illustrative workflow. Available features depend on products and configuration.



Pebbles, Rocks, and boulders

Sort fixes by scope before assigning them.

Pebble · To-Do

This week, the site supervisor names a backup for start-date changes.

Rock · Quarterly priority

This quarter, standardize first-week readiness and skill sign-off for one role.

Boulder · Larger initiative

Over several quarters, roll the system out across programs and sites.

Rocks and To-Dos are EOS terms. Pebbles and boulders describe scope here.

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Build the first version for one role

Choose a role	Where is a recurring onboarding or readiness problem showing up?
Name an owner	Who owns the outcome, and who is the backup?
Map and observe	What steps will staff follow, and what will the reviewer check?
Listen and measure	What will staff tell you, and which number will you check weekly?
Pick the first action	What can you do this week, and what needs a quarterly Rock?

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What employees should be able to count on

A clear start, a safe way to learn, and a path to grow.

Onboard faster	Personalize practice and verify readiness for the work.
Simplify compliance	Give managers a clear view of requirements, sign-offs, and exceptions.
Support retention	Protect supervision time and follow through on development.

Questions and discussion



Please use the Q&A tab to submit questions.

- How do we make time for this when staffing is tight?
- How do we do this across different sites?
- Where should we start if the records are spread out?

Sources and further reading

U.S. Bureau of Labor Statistics

Occupational Outlook Handbook, Substance Abuse, Behavioral Disorder, and Mental...

National Council for Mental Wellbeing and The Harris Poll

Behavioral health workforce survey findings, April 2023

Liu et al., Psychological Bulletin

Unpacking the effects of socialization programs on newcomer retention, 2024

eCFR

42 CFR § 482.61(e), psychiatric hospital discharge summary

CDC

Quality Training Standards, learner assessment

EOS Worldwide: The EOS Model

Six Key Components of the Entrepreneurial Operating System

NAB and ACHCA

Guidelines for Designing an Administrator-in-Training Program

AHRQ

Action planning for the Surveys on Patient Safety Culture

Relias customer story: Rappahannock Area Community Services Board

Training assignment, compliance reporting, and supervisor visibility

Relias customer story: Mid South Rehab Services

Employee feedback and orientation redesign

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