

Peer Specialist Onboarding Checklist

A practical guide for setting peer specialists up to succeed

Purpose

This checklist supports ethical onboarding by establishing role clarity, protection, and support norms from the start. Onboarding is treated as a workforce protection strategy.

A. Before Day One

- Job description reviewed for role clarity and boundaries
- Compensation, schedule, and benefits confirmed in writing
- Supervisor identified and supervision schedule set
- Workspace, access, and tools prepared
- Non-peer staff informed of peer specialist role and purpose

B. Role Orientation

- Role purpose and core functions reviewed
- Role boundaries reviewed and discussed
- "Other duties as assigned" expectations clarified and limited
- Boundary decision-support process explained
- Expectations for documentation explained

C. Support & Protection Norms

- Supervision structure and frequency explained
- Reflective supervision purpose discussed
- Escalation pathways for boundary pressure identified
- Permission to pause and consult reinforced
- Wellness and time-off policies reviewed

D. Team Integration

- Introductions to team members completed
- Explanation of how peer specialists fit within the team

- Communication norms clarified
- Expectations for collaboration reviewed

E. 30–60–90 Day Checkpoints

- 30-day role clarity check-in
- 60-day workload and support review
- 90-day reflection on fit, boundaries, and sustainability

Onboarding is complete when:

The peer specialist understands the role, feels supported, and knows how to raise concerns safely.