

SOAR Best Practices Guideline

1. Selecting Internal SOAR Trainers

Best Practices:

- Choose employees with **at least one year of SOAR experience**, preferably in behavioral or crisis-prone settings.
 - Select staff with **longevity, strong communication skills, and a calm, respectful demeanor**.
 - Avoid selecting new hires or staff unfamiliar with SOAR philosophy or techniques.
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2. Maintaining Trainer Competency

Best Practices:

- Trainers should teach **at least quarterly** to stay current and confident.
 - Small agencies may adapt based on staffing needs, but quarterly remains the ideal.
 - Trainers should engage in:
 - Co-training
 - Peer observation
 - Periodic review of updated UACS materials or guidelines
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3. Training Frequency for Direct Care Staff

Best Practices:

- Provide SOAR training **within 30–60 days of hire** (DSPD requires within 6 months).

- Annual recertification is required for all direct care staff.
 - Booster reviews every **6 months** recommended for behavioral homes.
 - Immediate retraining should occur after:
 - Incidents involving safety
 - Incorrect or unsafe use of techniques
 - Documented skill deficiencies
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4. Class Size & Training Format

Best Practices:

- **Level I:**
 - No maximum size; discussion-based and lecture-driven.
 - **May be taught online or in person.**
 - Can be taught **1:1** for staff needing individualized support.
 - **Level II & III:**
 - **Must be taught in person** due to physical technique practice.
 - Training groups should be limited to **14–16 participants per trainer**.
 - Consider a **second trainer** for larger classes or higher-risk groups.
 - **Curriculum Fidelity:**
 - Trainers must teach **SOAR material exactly as presented** in the approved curriculum.
 - Agencies are responsible for ensuring **competency in both content and technique**.
 - No modifications, additions, or mixing with other systems (CPI, Mandt, PCM, etc.).
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5. Training Environment & Safety

Best Practices:

- Training areas must allow safe movement and practice.
 - Avoid teaching in cramped or cluttered environments.
 - Staff should not attempt techniques they cannot perform safely.
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6. Competency Expectations

Best Practices:

- All competencies must be demonstrated with **100% accuracy**.
 - Unsuccessful staff should receive re-testing, coaching, or remediation.
 - Certification should **not** be awarded if staff cannot safely execute techniques.
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7. Ethical & Safety Standards

Best Practices:

- Reinforce that SOAR prohibits:
 - Pain or pressure techniques
 - Hyperextension
 - Joint manipulation
 - Coercion
 - Physical intervention should be used **only when necessary** and only as taught.
 - Greatest recognition should be given to staff who **prevent crises without physical interventions**.
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8. Internal Recordkeeping & Certificates

Best Practices:

- Agencies must maintain a **comprehensive internal recordkeeping process** documenting:
 - Training dates
 - Competency results
 - Certificates of completion
 - Attendance logs
 - Trainers must **download internal certificates** for every completed training.
 - Agencies are required to keep certificates and related records for compliance and audits.
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9. Training Scheduling & Accessibility

Best Practices:

- Schedule trainings in advance and ensure staffing coverage.
 - Provide accommodations for staff with disabilities, pregnancy, or physical limitations.
 - Allow additional coaching time or individualized sessions as needed.
 - Never rush the physical technique portion; adequate practice time is essential.
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10. Continuous Quality Improvement

Best Practices:

- Supervisors should periodically observe SOAR practice in real settings.
- Agencies should review:
 - Incident reports
 - Frequency and type of Level II/III interventions

- Staff feedback
 - Skill gaps or training trends
 - Adjust internal training frequency or support based on data and outcomes.
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