NEW EMPLOYEE ORIENTATION CHECKLIST
(Assistant Manager)

Administration
☐ Complete All New Hire Paperwork
☐ Send New Hire Paperwork to Corporate
☐ Issue/Order Name Badge
☐ Complete OneSite/Yardi Password Form
☐ Give Job Description*
☐ Give Employee Phone List

Welcome & Introductions
☐ Office Tour
☐ Employee Introductions

Property Tour
☐ Clubhouse (if applicable)
☐ Business Center (if applicable)
☐ Maintenance Shop
☐ Mail Area
☐ Laundry Facility(s)
☐ Pool Area(s)
☐ Target Units
☐ Other Common Area Facilities

Manuals & Online Resources
☐ Read The Employee Handbook
☐ Read The Leasing Guide
☐ Read Operations Manual
☐ Explain & Review Online Resources

Policies & Procedures
☐ Dress Code
☐ Labor Laws & Policies Posters
☐ Pay Dates
☐ Overtime/Comp Time
☐ Timesheets
☐ Sick / Late Call In Procedures
☐ Lunches & Breaks
☐ Smoking
☐ Gossip*
☐ Chain of Command*
☐ Disciplinary Actions
☐ Computer Use
☐ Cell Phones
☐ 411 Policy (Do Not Use)
☐ Go Over Specific Responsibilities

OSHA Requirements
☐ SDS Book
☐ Location of SDS Book

Property Office
☐ Do Not Move Office Furniture or Decor
☐ Office Appearance & Cleanliness
☐ Office Atmosphere
☐ Office Hours
☐ Go Over Greeting Prospects & Residents
☐ Go Over Answering the Telephone
☐ Answering Service Procedures
☐ Emergency Procedures
☐ Location of Emergency Cut-Offs
☐ Safety Procedures
☐ View New Employee Safety Orientation
☐ Location of First Aid Kit
☐ Location of Fire Extinguishers
☐ Mail & Deliveries
☐ Key Control
☐ Golf Cart (if applicable)

Leasing
☐ Review Fair Housing Policies
☐ Explain & Review Market Survey
☐ Discuss Marketing & Current Market Conditions
☐ Discuss Section 8 Housing Policy (if applicable)
☐ Discuss Target Units/Mini Models/Tent Cards
☐ Discuss Weekly Specials (if applicable)
☐ Explain the Rental Qualification Guidelines
☐ Explain the Welcome Card
☐ Explain the Leasing Callback Box
☐ Go Over Specific Responsibilities

Computers
☐ Do Not Move Computers or Peripherals
☐ Review Computer Use Policies
☐ Go Over Management Software
☐ Go Over Bluemoon
☐ Go Over Support Options

Telephone Technique
☐ Go Over the Telephone Cue Card
☐ Answering the Telephone
☐ Welcome Card
☐ Shopping Report

Welcome Card
☐ Review Welcome Card
☐ Complete Information on Card
☐ Explain Driver’s License Policy
☐ Complete Welcome for Every Prospect
☐ How to Enter Welcome Cards into the Computer
Demonstrating Apartment
- Greeting Prospects
- Welcome Card
- Review the Property Tour Checklist
- The Tour
- Closing

Service Requests / Work Orders
- How to take a Work Order
- Enter into the Computer, Print & Distribute
- Complete & File
- Explain the Work Order Follow Up Log
- Notify Manager of Repeats & Not Completed

Rent Collection Procedures
- Review Rent Collection Procedures
- Explain Cash Policy (No Cash)
- Explain No Personal Checks after Late Date

The Application
- Watch the TAA Application Video
- Explain & Review the TAA Application
- How to Access Bluemoon & Print Application
- Review Front
- Complete the Back
- Signatures
- Application Fees & Deposits
- Explain Holding Apartments
- Review the Restricted Breed’s List
- How to Enter the Application into Computer
- Explain Make-Ready Board
- Role Play (Applicant & Leasing Consultant)

Application Verification
- Explain Application Verification Form
- How to perform Background/Credit Check
- How to read Screening Reports
- Disclosure Letter (Do Not Discuss w/Prospect)
- Explain Apartment Lease Guaranty
- Approval or Rejection
- Only Manager’s can Sign Approvals
- Review TAA Application Video

The Lease & Addenda’s
- Watch the TAA Lease Contract Video
- Explain & Review the TAA Lease
- Read the TAA Lease Brief
- How to Access Bluemoon
- How to Type & Print Lease & Addenda’s
- Only Manager’s can Sign the TAA Lease

Resident Handbook
- Read the Resident Handbook
- Explain the Resident Handbook

Move In
- Explain the Move In Inventory Form
- 48 Hours to Complete & Return Move In Inventory
- Move In Inventory Form Signatures
- Walk Apartment Before Move In
- Explain TAA Lease to Resident
- Review TAA Lease Contract Video
- Signatures
- Money
- Explain the Resident Handbook
- Explain New Resident Information Sheet
- How to Enter Move In into Computer
- Make Ready Board

Move Out
- Explain Early Termination Fee’s Policy
- Explain Transfer Policy
- Explain Move Out Notice
- Report Move Out Notice’s to Manager
- Explain Move Out Cleaning Instructions
- How to Enter Move Out into Computer
- Make Ready Board

Resident Retention
- Renewal Program
- Renewal Lease
- Only Manager’s can Sign the Lease Renewals
- How to Type & Print a Lease Renewal
- Explain Renewal Lease – 6 Page New Lease Only
- Birthday Cards
- Resident Programs & Functions
- Do Not Create Any Social Media Accounts

Resident Files
- Explain Lease File Checklist
- Explain the Conversation Log
*Gossip* – Explain that gossip or negative talk will NOT be tolerated. Also, if they witness someone, lying, cheating or stealing they must report it. That is NOT gossip.

*Job Description* – Explain that it is their responsibility to do the job outlined in the Job Description. Also, if they do not know how to do something or do not understand that it is their responsibility to ask questions and learn how.

*Chain of Command* – Explain that the Manager is the on-site Supervisor and that every attempt to resolve any problem should be done with Manager. If a resolution cannot be reached then contact the AVP.

**Cross Training** – Teach them their position then cross train them for other positions.

___________________________________________________  
____________________________________  
Employee Signature  
Date  

___________________________________________________  
Employee Printed Name