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Our onboarding process is designed to help ensure new employees are welcomed to the organization and given all the support they need to quickly become effective in their new roles. It should be a two-way process that allows you to get to know the organization, and allows the organization to get to know you.

The purpose of the Onboarding Checklist is to help document and track the completion of all your onboarding task.

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| **Employee Information** |
| Name: |  |
| Job Title: |  |
| Business Unit: |  |
| Supervisor’s Name: |  |

Instructions:

For each task, initial that you have completed the task, note the date task was completed, and have the Employee that showed or explained the task to verify the information was communicated. If you need more training or assistance on a task, do not note a complete date until additional training or assistance is complete.

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| **HR INTRODUCTION & INFO** | CompleteBy:  | Initial when Complete: | Date When Completed: | Shown by(initial): |

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| I have reviewed my job description with my Regional Manager. | *Day 1* |  |  |  |
| I have reviewed the payroll process, time cards, overtime polices, and leasing bonuses with my Regional Manager or Supervisor. | *Day 1* |  |  |  |
| I have been shown the process for requesting Paid Time off. | *Day 1* |  |  |  |
| Online New Employee Orientation Modules* All new Employees must complete the New Employee Orientation modules through Bamboo HR within 3 days from date of hire. The Modules are as follow:

Module Name:* New Employee Orientation
* Fair housing and Sexual Harassment Training
* Landrum-NHE HR & Payroll Paperwork
* W-4
* Landrum Labor agreement
* Terms of Employment Notice
* Bamboo-Employee Access Manuel
* Direct Deposit
* NHE Employee Handbook, Benefits Information and NHE/HKA Explanation
 | *Day 1-3* |  |  |  |
| I have met all team members and toured the property | *Day 1* |  |  |  |
| I ate Lunch with my team and/or Mentor  | *Day 1* |  |  |  |
| I have received an NHE Important Contact Info sheet | *Day 1* |  |  |  |
| Worker’s Compensation* What is worker’s compensation
* What to do when an employee has an injury at work
* Drug testing for work related injuries
 | *Week1-2* |  |  |  |
| I understand my Regional Manager’s expectations and the importance of teamwork and communication . | *Day 1* |  |  |  |

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| **TRAINING** | Complete By: | Initial when complete: | Date Completed: | Shown by: (initials) |
| **Grace Hill Vision X*** URL: [www.gracehillvision.com/nhe](http://www.gracehillvision.com/nhe)
* Username: (First initial of first name, Full Last name, Year hired)
* Password: NHEpassword (Case Sensitive)

Grace Hill courses are assigned specifically by position. Please log in to allow Team member to review course assignments.* All team members are required to complete assigned courses in their bookbag, which are also listed under “My Assignments” in the Learning Center.

. | **Ongoing** |  |  |  |
| **I Love Leasing Training**: (Must attend one- schedule at least one week in advance)* 2nd Tuesday of each month at 2:00 pm EST
* 3rd Tuesday of each month at 2:00 pm EST

**To sign up, email:** [**www.help@iloveleasing.com**](http://www.help@iloveleasing.com) | *By Week 4* |  |  |  |
| **J. Turner** : (must attend one- schedule at least one week in advance) | *By Week 4* |  |  |  |
| **Bluemoon Training** (How to type a lease and renewal, and how to print lease agreement forms and e-sign)  | *By Week 2* |  |  |  |

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| **OFFICE/PROPERTY** | Complete By: | Initial when complete | Date Completed: | Shown by: (initials) |
| I know the office hours, was given key fobs/cards, and alarm codes (if applicable) | *Day 1* |  |  |  |
| I have been shown where refreshments are kept and my role in making sure they are available for residents and guests. | *Day 1* |  |  |  |
| I know where to find the equipment and office supplies (lease folders, paper, pens, printer, fax machine, etc.) | *Day 1* |  |  |  |
| I have received all user names and passwords I need to do my job efficiently  | *Day 1* |  |  |  |
| I know who to contact in case of an emergency(courtesy officer, co-worker, maintenance supervisor, Regional Manager) | *Day 1* |  |  |  |
| **Computer Based Orientation*** Intranet: Forms & Policies and Procedures (review all forms and print as needed)
* Outlook – set up email signature
* How to scan documents
* E-Signatures
 | *Week 1-2* |  |  |  |
| **I am familiar with on-site leasing/management office:*** Office appearance
* Organization of leasing/management office
* Cleanliness of leasing/management office
* Where to place work orders when printed
* Where resident Fed Ex & UPS packages are kept
* Where balloons and property bandit signs are stored
* Where sparkle kit is kept
* Where leasing and renewal files are stored
 | *Week 1-2* |  |  |  |
| **Resident/Property Key Procedure*** Received Handy Trac Log in
* Reviewed Sign out/ Sign in Sheet (Must be completed each time a key is checked out)
* Know the number of keys per unit
* Know key cost replacement
 | *Week 1-2* |  |  |  |
| **Amenities** * Location of pool(s), fitness center, clubhouse, laundry facility, etc.
* Rules on use of all and their hours of being accessible to residents
* Reporting Maintenance issues for amenities
 | *Week 1-2* |  |  |  |
| **Resident Complaints*** I understand how NHE wants complaints from residents to be handle
* I have reviewed with my team how to handle complaints and they know they can pass them to me if they are unable to resolve any resident complaints
 | *Week 1* |  |  |  |

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| **LEASING** | Complete by: | Initial when complete | Date complete | Shown by: (Initials) |
| **Leasing Notebook*** I have been provided with a leasing notebook to build and understand my responsibilities for keeping it up-to-date
 | *By week 4* |  |  |  |
| **NHE (telephone) Greeting*** **“Thank you for calling [Property Name], this is [Employee’s first name] how may I help you?**
 | *Week 1* |  |  |  |
| **Leasing Phone Calls*** I know how to answer the phone using NHE’s greeting, which questions to ask in pre-qualifying prospects over the phone, and when to provide pricing information
* I understand how to set an appointment and that I should try to set an appointment on every leasing inquiry call
* I understand how to document all leasing phone calls and how to record the information in the system
* I understand how to follow up with prospective phone calls
 | *Week 1-2* |  |  |  |
| **Guest Cards/ Traffic*** How to complete a guest card
* Using guest card to prequalify prospect and find out needs/wants of prospect
* Where to store guest cards
* Entering traffic daily from guest card into I Love Leasing
* Following up with traffic and documenting follow up
* Understand the importance to complete guest card and enter traffic
 | *Week 1-2* |  |  |  |
| **Follow Up*** I know how to document follow up according to NHE
* I know what is required for property follow up on actual visit/tours
* I know what is required for property follow up with phone calls
 | *Week 1-2* |  |  |  |
| **Checking Voicemails*** I know how to check voicemails
* I understand as a team, voicemail need to be check at least 3 times a day (morning, mid-day, end of day)
 | *Week 1* |  |  |  |
| **Pricing & Availability*** I know how to locate current pricing and availability
* I understand the role Fair Housing plays with pricing and availability
 | *Week 1-2* |  |  |  |
| **Tour Path*** I have been shown the tour path (walkway) and understand why a tour path is used
* Walk tour path each morning to pick up trash and freshen up
 | *Week1* |  |  |  |
| **Showing an Apartment/Model (Property Tour)*** Every Morning: walk/freshen up model and any vacant apartment being shown for the day
* Make sure your keys work for vacant apartments
* Demonstrating features and benefits while showing the apartment
* Safety procedures when showing the model or vacant apartments
 | *Week 2-3* |  |  |  |
| **Closing the Tour*** Know the different types of closing
* Overcoming common objections/rebuttals
* How to hard close behind/ alongside the leasing agent
* Know how many times to attempt a close
 | *Week 2-3* |  |  |  |
| **Leasing an Apartment** * Residential Application (understanding who needs to complete the application and able to answer questions about application)
* Know the qualifying criteria information to explain to prospect (3x market rate, credit/criminal screening, etc.)
* Collecting Fees (Application, Reservation, etc.)
* Collecting Security Deposits
* How to complete Welcome Letter
* Where to store application, proof of income, etc.
* What to do if an application is denied
* What to do if an application is approved
 | *By week 4* |  |  |  |
| **Mystery Shopping*** My Mentor has provided me with a blank copy of a mystery shop form
* I reviewed the mystery shopping report with my mentor and I am aware of what is required for passing the mystery shop
* I have shopped at least two comps in person
* I have phone shopped at least one comp
* I have familiarized myself with the local market
 | *Week 1* |  |  |  |

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| **YARDI** | Complete by: | Initial when complete | Date when complete | Shown by: (Initials) |
| **Yardi Dashboard*** Resident Activity Section
* Maintenance Section
* Unit Statistics Section
* NHE Custom Menu (Roles->NHE custom menu)
* Know where to pull reports and how often they need to be pulled
* Open Batches
 | *Week 1-4*  |  |  |  |
| **Service Request/ Work Orders** * How to create a Service Request/ Work Order
* What information is needed to accurately submit the request
* What is consider an emergency request
* How to close a request when it’s completed
* How to follow up on completed service request
 | *Week 1-4* |  |  |  |
| **Accounts Receivable*** Know the acceptable forms of payments
* How to post payments (what software to use and how to use scanner)
* Bank Deposits
* Running Age Receivable reports
* What a failed receipt is and how to correct it
* Returned check policy
* Late Notices (template, when they are supposed to be sent out.
* Late Fees (How and when to add legal fees)
* Filing Evictions (add legal fees, where court is located, when evictions need to be filed, what you need to file an evictions)
 | *Week 1-4* |  |  |  |

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| **Charges*** Where the quick charge option is located in Yardi
* Know the importance of charges being coded to correct charge code
* Review charge codes
* How to correct a charge that was coded to wrong code
* Reverse charges
* Reoccurring charges (lease charges, utilities, rentable items, pet rent)
 | *Week 1-4* |  |  |  |
| **Receipt Batch/ Zero Receipt*** How to close out a receipt
* Know where in Yardi to close out a zero receipt
* When does a zero receipt need to be closed out
 | *Week 1-4* |  |  |  |
| **Move Outs/ Collections*** Completing Deposit Accounting (after resident is moved out in Yardi, all keys, access items are turned in, and move out inspection is completed)
* Review NHE Move Out Charges estimate sheet
* Adding move out charges and who to contact to get invoices for move out charges (Maintenance Supervisor, Vendors, or Community Manager will be able to provide quotes for charges)
* Where move out pictures stored
* How to notify previous resident of final charges, or refund (what documentation/ information is mailed to the resident)
* Refunding Security Deposits
* What collection company is used on property
* How long before you send previous resident’s balance to collections
* What documentation is sent to collections
* Find out if there is a balance minimum that does not get sent to collections
* Where are collection files kept
 | *Week 1-4* |  |  |  |
| **Move Ins/Renewals** * Confirming lease end date in Yardi matches lease agreement in file
* Know how to add all lease charges from lease agreement
* Confirming all charges are correct
* Checking that all lease pages are signed
* Confirming all move in money is posted to correct account (apply money to Security Deposit charges first)
 | *Week 1-2* |  |  |  |

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| **Invoices*** How to process invoices through Payscan
* When invoices are due
* Where to store original invoices
* P.O.’s purchase orders (carpet cleanings, etc.)
 | *Week 1-2* |  |  |  |
| **Weekly Leasing Report (WLR)*** Understanding the WLR
* Where to find information for report
* When it’s due
 | *Week 1-2* |  |  |  |
| **Financial Report (Owners Report)*** Understanding the Financial Report
* Where to find information for report
* When it’s due
 | *Week 2-3* |  |  |  |
| **Renewals** * How to generate renewal increases
* When to send Increase to regional for approval
* Where to locate lease expirations

  | *Week 3-4* |  |  |  |
| **Delinquency Report*** Where the report is located
* Understanding the report
* How to add notes to delinquency report
* When is the report due
* Know who you send the report to
* Procedures for collection delinquency rent (sending late letters, emailing and calling resident)
 | *Week 1-2* |  |  |  |
| **Notice to Vacates (NTV’s)*** All lease holders must sign NTV form or it cannot be submitted
* If it’s a lease break, know the lease break fees
* 60-day notice is required prior to vacating
* How to add notice in Yardi
* Always note the reason resident is vacating
* Acknowledgment of NTV letter needs to be sent
 | *Week 1-2* |  |  |  |
| **Account Month End*** Understand what is month end
* Review on Site Accounting Month End Checklist
* Know who is your accountant
 | *Week 3-4* |  |  |  |
| If you have any additional Yardi questions or issues, you can email Clifton, IT Manager, at cdavis@nhe-inc.com. You can also call Yardi’s Customer Service for screening, 800-736-8476 x1 | Ongoing |  |  |  |

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| **Property Budget** * Know where to find your property’s budget
* Understand the importance of the property budget
* reviewed the budget with your Regional and all questions you had were answered
 | *By week 4* |  |  |  |
| **Credit Card Reconciliation** * Purpose of SunTrust account
* Upload all receipts to tiny scanner or email to your email address
* How to code purchases correctly
* When coding for monthly purchases are due
 | *By week 4* |  |  |  |
| **Vendors*** Reviewed all Vendor Contracts
* Understand the process for obtaining new vendors when needed
* Know what information is needed so that vendors can be paid properly
* Know where vendor invoices are stored
 | *By Week 4* |  |  |  |
| **Bonuses*** When bonus reports are due and when bonuses are paid
* Understand how monthly bonuses are calculated
* Eligibility requirements for monthly bonuses
 | *By Week 4* |  |  |  |

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| **MARKETING** | Complete by: | Initial when complete: | Date when complete: |
| **Outreach Marketing** * What is outreach marketing
* Businesses to Market
* Marketing materials to take marketing
* Frequency
 | *By week 4* |  |  |
| **Online Marketing*** Websites property advertises
* Who maintains/updates
* How often is information updated
* How to respond to online review

**Social Media Marketing*** What sites
* Who maintains/updates
* How often is information updated
 | *By week 4* |  |  |
| **Property Marketing*** Balloons: Make sure they are filled and look fresh daily
* Amenity Signage: Ensure signs are straight and clean every day
* How to set up/use mini-model apartments
* 3x Craigslist postings, daily
* Post to Facebook at least 4x, weekly
* Brochures are stocked and readily available
 | *By Week 4* |  |  |

\*\* If you feel there is something not listed you need training on, please do not hesitate to let your Mentor/ know\*\*

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| Employee Acknowledgement  |

By signing below, with the help of my supervisor, I have successfully completed the Onboarding checklist.

Employee Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

By signing below, the Supervisor agrees that all topics were covered, all cells are initialed and dated accurately. Additionally, the Supervisor agrees that he/she verified that each topic is understood by the employee.

Mentor Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

When onboarding checklist is complete, scan and email a signed copy of this orientation checklist to your Regional Manager and the VP of Conventional Property Management