NEW EMPLOYEE ORIENTATION CHECKLIST
Below is a checklist containing information that may be provided to you upon hire as part of your employee orientation program.

MATERIALS FOR ALL EMPLOYEES
To Be Given To All Employees:
☑ Appointment Letter
☑ Self-Service Guide
☑ Multifactor Authentication (MFA) Guide
☑ Employee Assignment Form
☑ Patents and Inventions Policy
☑ RF SUNY’s Intellectual Property Policy
☑ Employment Eligibility Verification Form (I-9)
☑ Fraud and Whistleblower Policy
☑ Affordable Care Act Marketplace Notice
☑ Code of Conduct
☑ Annual Acknowledgment and Certification of Compliance with the Code of Conduct
☑ Drug-free Workplace Policy
☑ Employee Handbook
☑ Employee Handbook Acknowledgment
☑ Sexual Harassment Prevention Policy
☑ Conflict of Interest Policy
☑ Management of Conflicts of Interest
☑ Equal Employment Opportunity and Antidiscrimination Policy
☑ Posting Notices
☑ Lactation Break and Accommodation Policy
☑ RF Brochure
☑ Notice of Privacy Practices (PHI)
☑ Employee Work Schedule Info (as provided by supervisor)
☑ Training for New Employees
☑ Self-Identification forms [veteran, disabled, and sex/race/ethnicity]
☑ Payment Method – Direct Deposit of Salary form & Payment Method – Pay Card Form - Additional Direct Deposit Information form + Is Direct Deposit right for me?
☑ Applicable NYS Wage Notification Form [NYS DOL site]
Costborne Pathogens Notice
☑ RF-Ride Brochure
☑ Campus Wellness and Diversity Programs (if applicable)

TAX MATERIALS FOR ALL EMPLOYEES
☑ IRS Employee’s Withholding Allowance Certificate (W-4)
☑ NYS IT-2104 (Employee’s Withholding Allowance Certificate)

Additional Tax Forms For US Citizens, Permanent Residents, Resident Aliens only (if applicable):
☑ NYS IT-2104-E (Certificate of Exemption from Withholding)
☑ NYS IT-2104_J (Certificate of Nonresidence and Allocation of Withholding Tax)
☑ Resident Alien treaty exempt – IRS W-9
☑ Expatriate exemption IRS 673

Additional Form For Nonresident Aliens Only:
☑ IRS 8233 and supporting statement from IRS Pub 519 (if applicable)
☑ IRS Notice 1392 Supplemental Form W-4 Instructions for Nonresident Aliens

To Be Given To Graduate Student Employees Eligible for Benefits (all available on the RF web site):
☐ Graduate Student Self Service Guide
☐ GSEHP Member Handbook
☐ Graduate Student Employee Benefits Handbook
☐ GSEHP Health Plan Rates
☐ Graduate Student Dental Plan Brochure
☐ Graduate Student Vision Care Booklet
☐ Your Benefits: A Quick Reference Guide
☐ GSEHP Enrollment Form (if Self-Service unavailable)

To Be Given to Salaried Employees Only (with Regular, Biweekly pay) in Addition to the Material Above:
☐ Flexible Benefits Plan Expense Guide
☐ Voluntary Short Term Disability Enrollment Kit

To Be Given To Regular and Postdoctoral Employees Eligible for Benefits:
(All materials may be obtained electronically)
☐ Accessing Benefits Information on the RF Web site
☐ Virgin Pulse Wellness Plan Brochure
☐ Benefits Handbook – Regular Employees or Benefits Eligible
☐ Benefits Handbook – Postdoctoral Employees
☐ Your Benefits: A Quick Reference Guide
☐ Benefits Enrollment Form – Regular Employees or Postdoctoral Employees
☐ Health Plan Rates – Regular Employees or Postdoctoral Employees
☐ COBRA General Notice
☐ Benefits Booklet (Empire Traditional/Deductible PPO and Prescription Drug)
☐ HMO Materials
☐ Summary of Benefits and Coverage
☐ Delta Dental Fact Sheet
☐ Vision Plan Brochure & Vision Plan Plus Brochure
☐ Life Insurance Enrollment Kit

RETIREMENT MATERIALS
To Be Given To Regular, Summer, and Postdoctoral Employees:
☐ Your RF Benefits: Basic Retirement (RF web page)
☐ Your RF Benefits: Optional Retirement (RF web page)
☐ Basic Retirement – Employment Service Credit Form
☐ Basic Retirement Plan, Optional Retirement Plan
☐ Graduate Student Vision Care Booklet
☐ Your Benefits: A Quick Reference Guide
☐ GSEHP Enrollment Form

ONLINE ACCESS INFORMATION
To Be Given to All Employees
☐ www.rfsuny.org
☐ Login/Self Service Username and Password

MATERIAL FOR EMPLOYEES WORKING IN NYC
☐ NYC Paid Sick Leave Notice of Employee Rights
☐ Stop Sexual Harassment Act Factsheet

I have received copies or online access of all the items that relate to my employment status. I am also aware that I have online access to Research Foundation employee information.

Employee Name ____________________________ Date ____________________________

Original - Personnel File Copy/Duplicate – Employee Updated 4/14/23