NEW EMPLOYEE ORIENTATION CHECKLIST

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

MATERIALS FOR ALL EMPLOYEES
To Be Given To All Employees:
[ ] Appointment Letter
[ ] Self Service 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
[ ] 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]

Campus-specific or other information which may include:
[ ] Tuition Waiver Program information (full-time employees)
[ ] Educational Assistance Plan (graduate student employees)
[ ] Employee Assistance Program (EAP) Information
[ ] Campus Holiday Schedule
[ ] Bloodborne 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 8333 and supporting statement from IRS Pub 519 (if applicable)
[ ] IRS Notice 1392 Supplemental Form W-4 Instructions for Nonresident Aliens.

MATERIAL FOR BENEFITS-ELIGIBLE EMPLOYEES
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 and Instructions
[ ] Health Plan Rates
[ ] COBRA General Notice
[ ] Benefits Booklet (Empire Traditional/Deductible PPO and Prescription Drug)
[ ] HMO Materials
[ ] Summary of Benefits and Coverage (area health plans)
[ ] Delta Dental Fact Sheet
[ ] Vision Plan Brochure
[ ] Life Insurance Enrollment Kit

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 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)

RETIREMENT MATERIALS
To Be Given To Regular and 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 RF web page
[ ] TIAA-CREF microsite (www.tiaa-cref.org/rfsuny)
[ ] Fee disclosure, TIAA-CREF website [plan 101100 or 101101]

ONLINE ACCESS INFORMATION
To Be Given to All Employees
[ ] www.rfsuny.org
[ ] Login/Self Service User Name and Password

MATERIAL FOR EMPLOYEES WORKING IN NYC
[ ] NYC Paid Sick Leave Notice of Employee Rights
[ ] Stop Sexual Harassment Act Factsheet
[ ] NYC Lactation Room Accommodation

I have received copies or online access of all checked 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