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]
☒ Payroll Deductions - Direct Deposit Information Form + Is Direct Deposit right for me?
☒ Applicable NYS Wage Notification Form [NYSDOl 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-A (Certificate of Exemption from Withholding)
☒ NYS IT-2104-A1 (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.

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

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