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
- 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 Methods – Pay Card Form - Additional 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-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
- 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
- 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