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
- Employee Handbook
- Bloodborne Pathogens Notice
- RF Brochure
- Notice of Privacy Practices (PHI)
- Employee Work Schedule Info (as provided by supervisor)
- Self-Identification forms [veteran, disabled, and sex/race/ethnicity]
- Additional Form For Nonresident Aliens Only
- 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
  - Campus Wellness and Diversity Programs (if applicable)

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

Additional Tax Forms For US Citizens, Permanent Residents, and Resident Aliens only (if applicable):
- IRS IT 2104-E (Certificate of Exemption from Withholding)
- IRS IT-2104 1 (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 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

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
- 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

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, 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)
- Basic Retirement – Employment Service Credit Form
- TIAA-CREF microsite (www.tiaa-cref.org/rfsuny)
- Fee Disclosure – Basic Retirement Plan, Optional Retirement Plan

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