



# 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
    - RFSUNY'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](#)
  - [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 forme?](#)
  - 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-2104.1](#) (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.

## 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 – [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](#)
- [Your Benefits: A Quick Reference Guide](#)
- [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](http://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](http://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](#)
- [NYC Lactation Room Accommodation](#)

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