

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. After reviewing the information that has been checked, please sign and date below. A copy will be given to you for your records.

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](#)
 - [Employee Handbook](#)
 - [Employee Handbook Acknowledgment](#)
 - [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)
 - [New Employee Training Opportunities and Access](#)
 - 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-2104.1](#) (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 checked items that relate to my employment status. I am also aware that I have online access to Research Foundation employee information.

MATERIAL FOR BENEFITS-ELIGIBLE EMPLOYEES

To Be Given To Regular 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](#)
- [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 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 \(POMCO SPD\)](#)
- [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** 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](#)

_____ Date

_____ Employee Name

Original - Personnel File

Copy/Duplicate – Employee