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| **Checklist for SUNY Faculty Summer-Only RF Appointments** |

Below is a checklist containing information that should be provided to SUNY faculty members who receive a summer assignment with the RF. After reviewing the information that has been checked, please sign and date below. A copy will be given to you for your records.

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| **To Be Given To New SUNY Faculty:**  🞏 Appointment Letter   * [RF Application-SUNY Faculty](https://www.rfsuny.org/media/rfsuny/forms/Employment-Application---Summer-SUNY-Faculty.pdf) * [RF Application SUNY Faculty - NYC](https://www.rfsuny.org/media/rfsuny/forms/Employment-Application---Summer-SUNY-Faculty---NYC.pdf)   🞏 [Paid Family Leave Waiver](https://www.ny.gov/sites/ny.gov/files/atoms/files/PFLWaiver.pdf)  🞏 [Employee Assignment Form](http://www.rfsuny.org/media/RFSUNY/Forms/hafrm003.pdf)  🞏 [Patents and Inventions Policy](https://govt.westlaw.com/nycrr/Document/Iddf30c95c22311dd973ec82e85411269?viewType=FullText&originationContext=documenttoc&transitionType=CategoryPageItem&contextData=(sc.Default))  🞏 [RFSUNY’s Intellectual Property Policy](https://www.rfsuny.org/media/RFSUNY/Policies/intellectual-property-policy_pol.pdf)   * [Employment Eligibility Verification Form (I-9)](https://www.uscis.gov/i-9) (faculty who return the following summer and have a valid I-9 do not need to complete a new one. See [Employment Eligibility Policy](https://www.rfsuny.org/media/rfsuny/policies/employment-eligibility_pol.pdf).) * [Drug-free Workplace Policy](https://www.rfsuny.org/media/rfsuny/policies/per_drug-free-workplace_pol.pdf) * [Fraud and Whistleblower Policy](http://www.rfsuny.org/media/RFSUNY/Policies/fraud_whistleblower_policy.htm) * [Affordable Care Act Marketplace Notice](http://www.rfsuny.org/media/RFSUNY/Forms/ACA-notice.pdf) * [Code of Conduct](http://www.rfsuny.org/media/RFSUNY/Policies/code_of_conduct.pdf)   🞏 [Employee Handbook](http://www.rfsuny.org/media/RFSUNY/Documents/HR/Employee-Handbook.pdf)   * [Employee Handbook Acknowledgment](http://www.rfsuny.org/media/RFSUNY/Forms/employee_handbook_acknowledgment.pdf) * [Conflict of Interest Policy](https://www.rfsuny.org/media/rfsuny/policies/conflict-of-interest-policy.pdf) * [Management of Conflicts of Interest](https://www.rfsuny.org/media/RFSUNY/Procedures/management_of_coi_pro.pdf) * [Equal Employment Opportunity and Antidiscrimination Policy](https://www.rfsuny.org/media/RFSUNY/Policies/equal-employment-opportunity-antidiscrimination_pol.pdf) * [Posting Notices](https://www.rfsuny.org/media/rfsuny/procedures/per_posting-notices_pro.pdf) * [Lactation Break and Accommodation Policy](https://www.rfsuny.org/media/rfsuny/policies/lactation-accommodation_pol.pdf) * [RF Brochure](http://www.rfsuny.org/media/RFSUNY/Documents/RF-Brochure.pdf) * [Notice of Privacy Practices (PHI)](http://www.rfsuny.org/media/RFSUNY/Forms/notice_privacy_practices.pdf)   🞏 Employee Work Schedule Info (as provided by supervisor)   * Self-Identification forms [[veteran, disabled, and sex/race/ethnicity](https://www.rfsuny.org/media/rfsuny/documents/affirmative-action/Reasonable-accomodation.pdf)] * Payment Method – Direct Deposit of Salary form & Payment Method – [Pay Card Form](https://www.rfsuny.org/media/RFSUNY/Forms/payment-method-pay-card_frm.pdf) - Additional Direct Deposit Information form + [Is Direct Deposit right for me?](https://www.rfsuny.org/media/RFSUNY/Procedures/pay_direct-deposit-is-direct-deposit-for-me_pro.pdf) * Applicable NYS Wage Notification Form [[NYSDOL site]](https://dol.ny.gov/notice-pay-rate)   **Campus-specific or other information which may include:**  🞏 Bloodborne Pathogens Notice  **TAX MATERIALS FOR ALL EMPLOYEES**   * IRS Employee's Withholding Allowance Certificate [(W-4)](https://www.irs.gov/pub/irs-pdf/fw4.pdf) * [NYS IT-2104](https://www.tax.ny.gov/forms/withholding_cur_forms.htm) (Employee’s Withholding Allowance Certificate)   **Specialized Tax Forms For US Citizens, Permanent Residents, Resident Aliens only (if applicable)**:  🞏 [NYS IT 2104-E](http://www.tax.ny.gov/forms/withholding_cur_forms.htm) (Certificate of Exemption from   Withholding)  🞏 [NYS IT-2104.1](http://www.tax.ny.gov/forms/withholding_cur_forms.htm) (Certificate of Nonresidence and   Allocation of Withholding Tax) 🞏 Resident Alien treaty exempt – [IRS W-9](http://www.irs.gov/pub/irs-pdf/fw9.pdf) 🞏 Expatriate exemption [IRS 673](http://www.irs.gov/pub/irs-pdf/f673.pdf) **Additional Form For Nonresident Aliens Only**:  🞏 [IRS 8233](http://www.irs.gov/pub/irs-pdf/f8233.pdf) and supporting statement from [IRS Pub 519](http://www.irs.gov/pub/irs-pdf/p519.pdf) (if  applicable)  🞏 [IRS Notice 1392](http://www.irs.gov/pub/irs-pdf/n1392.pdf) Supplemental Form W-4 Instructions for   Nonresident Aliens. | **RETIREMENT MATERIALS**  🞏 [*Your RF Benefits: Basic Retirement*](https://benefits.rfsuny.org/summer-employees/basic-retirement/) (RF webpage)  🞏 [*Your RF Benefits: Optional Retirement*](https://benefits.rfsuny.org/summer-employees/optional-retirement/) (RF  webpage) 🞏 [*Basic Retirement – Employment Service Credit*](https://benefits.rfsuny.org/summer-employees/basic-retirement/employment-service-credit/) (RF  webpage)  🞏 [*Basic Retirement – Employment Service Credit Form*](https://www.rfsuny.org/media/RFSUNY/Forms/prior_service_credit_form.pdf)  🞏 [*TIAA-CREF microsite*](http://www.tiaa-cref.org/rfsuny) *(www.tiaa-cref.org/rfsuny)*  🞏 Fee Disclosure – [Basic Retirement](https://www.tiaa.org/public/tcm/rfsuny/retirement-benefits/plan-101100), [Optional Retirement](https://www.tiaa.org/public/tcm/rfsuny/retirement-benefits/plan-101101)  🞏 [Universal Availability Notice](http://www.rfsuny.org/media/RFSUNY/Forms/universal_availability_notice_0.pdf)  🞏 [Benefits Handbook](http://www.rfsuny.org/media/RFSUNY/Forms/benefits_handbook.pdf)  **ONLINE ACCESS INFORMATION**  **To Be Given to All Employees**  🞏 [www.rfsuny.org](http://www.rfsuny.org/)  🞏 [Multifactor Authentication (MFA) Guide](https://www.rfsuny.org/media/rfsuny/documents/MFA-Quick-Start-Guide.pdf)  🞏 [Self Service Guide](http://www.rfsuny.org/Information-For/Employee-Center-/Self-Service/)  (Check email for Login/Self Service Username and Password)  Complete NY and Federal Tax Forms  Complete Direct Deposit  Complete Optional Retirement Enrollment  **MATERIALS FOR EMPLOYEES WORKING IN NYC**  🞏 [NYC Paid Sick Leave Notice of Employee Rights](https://www1.nyc.gov/assets/dca/downloads/pdf/about/PaidSafeSickLeave-MandatoryNotice-English.pdf)  🞏 [Stop Sexual Harassment Act Factsheet](https://www1.nyc.gov/assets/doc/downloads/EEO/Stop_Sexual_Harassment_Fact_Sheet.pdf) |

I have received copies of all checked items that relate to my employment status. I am also aware that I have online access to Research Foundation employee information.

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| Original - Personnel File Copy/Duplicate – Employee |

Employee Name Date