# 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
- ☐ NYS Policy on the Rights of Employees to Express Breast Milk in the Workplace
- ☐ RF Brochure
- ☐ Notice of Privacy Practices (PHI)
- ☐ Employee Work Schedule Info (provided by supervisor)
- ☐ Training for New Employees
- ☐ Self-Identification forms [veteran status and sex/race/ethnicity]
- ☐ Payment Method – Direct Deposit of Salary 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
- ☐ Additional Campus 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 Website
- ☐ 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 website):**

- ☐ 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 webpage)
- ☐ Your RF Benefits: Optional Retirement (RF webpage)
- ☐ Basic Retirement – Employment Service Credit (RF webpage)
- ☐ 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 Username and Password
- ☐ Multifactor Authentication (MFA) Guide

## MATERIAL FOR EMPLOYEES WORKING IN NYC

- ☐ NYC Paid Sick Leave Notice of Employee Rights
- ☐ Stop Sexual Harassment Act Factsheet
- ☐ NYC Know Your Rights at Work Poster

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.

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Employee Name Date