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
☐ Multifactor Authentication (MFA) Guide
☐ Employee Assignment Form
☐ Patents and Inventions Policy
☐ RF SUNY’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
☐ Lactation Break and Accommodation Policy
☐ 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 for me?
☐ Applicable NYS Wage Notification Form [NYSWOL 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-E (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 webpage)
☐ Your RF Benefits: Optional Retirement (RF web page)
☐ Basic Retirement – Employment Service Credit Form
☐ 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

MATERIAL FOR EMPLOYEES WORKING IN NYC
☐ NYC Paid Sick Leave Notice of Employee Rights
☐ Stop Sexual Harassment Act Factsheet

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 _______________________

Original - Personnel File Copy/Duplicate – Employee Updated 4/14/23