



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 (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 [[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 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.

Employee Name

Date