

Orientation Materials to be Provided to New Employees

Function: Benefits
Procedure: New Employee Process

Guideline Recommendations

This document is meant to serve as a guideline for benefits administrators. Benefits material should be provided in a separate folder from other orientation materials for those employees who are eligible for benefits. Please refer to the New Employee Orientation Checklist, which contains a list of information that may be provided to new employees.

All Employees

Item	More Information
Appointment Letter	Letters of Appointment Policy Appointment Letter template
Employee Assignment Form	Additional forms can be found on the Forms A-Z page on the RF public website
Form I-9 Employment Verification	Employment Eligibility Requirements: The I-9 Process
Code of Conduct	See also the RF Corporate Ethics and Values website page.
Notice of Privacy Practices (PHI)	Privacy and Security of Protected Health Information
Employee Work Schedule Information	Provided by Supervisor - required to have on file for part-time employees for leave accrual purposes
Payment Method - Direct Deposit of Salary Payment Method - Additional Direct Deposit Information	Direct Deposit Enrollment and Payment Method Changes
Applicable NYS Wage Notification Form	Fillable PDF versions of the 6 forms found in Hiring/New Employee Process Wage Theft Prevention Act (WTPA) guidance on NYS website

Additional Campus Specific and Other Information

The following table provides a list of optional material to be given to employees and links to where more information can be located:

Item	More Information
Tuition Waiver Program information (for all full-time employees)	Location Specific Tuition Waiver Policy Statement
Bloodborne Pathogens Notice (when applicable to location or position)	OSHA (for appropriate positions) Occupational Exposure to Bloodborne Pathogens

Tax Materials for All Employees

The following table provides a list of the tax material to be given to all employees:

Item	More Information
IRS Employee's Withholding Allowance Certificate (W-4)	RF Taxation Guidance on Employee Payments to U.S. Citizens, Permanent Residents and Resident Aliens
NYS IT-2104 (Employee's Withholding Allowance Certificate)	
	Processing Taxation and Exemption of Employee Payments to Nonresident Aliens
	Tax Forms and Publications - Federal and State

Additional Tax Materials for US Citizens, Permanent Residents, and Resident Aliens

The following table provides a list of additional tax materials that may be given to US Citizen, Permanent Resident, and Resident Alien employees:

Item	More Information
NYS IT 2104-E (Certificate of Exemption from Withholding)	RF Taxation Guidance on Employee Payments to U.S. Citizens, Permanent Residents and Resident Aliens
NYS IT-2104.1 (Certificate of Nonresidence and Allocation of Withholding Tax)	
Resident Alien treaty exempt - IRS W-9	Tax Forms and Publications - Federal and State
Expatriate exemption IRS 673	

Additional Tax Materials for Nonresident Aliens Only

The following table provides a list of additional tax materials that may be given to Nonresident Alien employees:

Item	More Information
IRS 8233 and supporting statement from IRS Pub 519	Completing IRS Form 8233 for Nonresident Aliens Requesting Tax Treaty Exemption

Regular Employees Eligible for Benefits

The following table provides a list of the material to be given to employees eligible for benefits and links to where a sample or more information can be located. These should be provided in a separate folder from the information provided to all employees.

Item	More Information
Benefits Handbook	Located on the Your RF Benefits page under Benefits Publications on the RF website. A limited supply will be provided to campus locations if the employee requires a hardcopy, which is his or her legal right.

Online Access Information for All Employees

The following table provides online information to be given to benefits-eligible regular employees and links to where a sample or more information can be located:

Item	More Information
www.rfsuny.org	Research Foundation website home page
Login/Self Service User Name and Password	Self Service page on website

Change History

Date	Summary of Change
May 19, 2016	Updated to reflect that New Employee Orientation Checklist document now has most of the links needed; Changed from Procedure to Guidance document.
April 28, 2015	Added section "Material for Employees Working in NYC".
September 20, 2013	Corrected links and added required ACA disclosures.
September 17, 2012	Added TIAA-CREF fee disclosure information under Retirement Materials section.
July 17, 2012	Reorganized sections to reflect changes in New Employee Orientation Checklist. Added Tax Materials and Online Access Information sections. Updated links.
November 22, 2010	Added Self Service Information to Optional section.
April 29, 2010	Updated links.

February 23, 2009	Updated links and reorganized sections.
May 30, 2008	Restructured to match revised orientation checklist.
May 30, 2007	Updated links and removed references to EPSS.
April 25, 2005	Updated link to NCQA website for health plan ratings and summaries.
April 15, 2005	Added new link to GSEHP Member Handbook. Removed link to Graduate Student Employee - Summary of Benefits, which is obsolete and is being archived.
March 15, 2005	Removed obsolete links to GSEHP member handbook, which is expected to be updated and re-issued for July 2005.
September 29, 2004	Updated links to Flexible Benefits Plan, FSA Enrollment Form. Added link to Employee Handbook and Agreement form
May 20, 2003	Added Group Long Term Care Brochure.
May 14, 2003	Added NCQA Health Portal Description.
March 31, 2003	Added Graduate Student Summary of Benefits, Graduate Student Vision Care Booklet, and Notice of Privacy Practices
April 9, 2002	Add new categories "Salaried Employees Only" and "Graduate Student Employees Eligible for Benefits." Add College Savings Program, Qualified Transportation Benefits Program, and Consumer's Medical Resource. Add Graduate Student Dental Plan Brochure.
May 21, 2001	Add link to Patent Waiver and Release Agreement for all employees.

Feedback

Was this document clear and easy to follow? Please send your feedback to webfeedback@rfsuny.org.

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