



Procurement News

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Stony Brook University
Procurement Office

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Important Information Regarding the Security of your Visa Procurement Card!

Cardholders are reminded that they should **carefully review their card statement each month**, report any transactions that you do not recognize to **Citibank customer service** (the number on the back of your Visa card) **and** the P-Card Administrator **Maryann Dolan** at **2-6017**.

You are the only one who should be using **your card**. Do not allow other staff members access to your card.

Do not share passwords with staff members.

Beware of the **Phishing Scam** e-mails claiming to be from a bank, credit card company or financial services vendor. **Never respond** to any of these e-mails, call the Citibank customer service number on the back of your card if you have any concerns.

Be sure to know the vendors that you are dealing with. This is especially important when making on-line purchases. There are some on-line sites that promise **extremely low prices**, just to lure you in. They collect your credit card info, and then inform you that the product is out of stock. They now have your credit card info. They use the info to make fraudulent transactions with your card number. Next time you check the site is closed down! This is a **Phishing Scam!**

Report lost or stolen credit cards to Citibank at 1-800-790-7206 and **Maryann Dolan** P-card Administrator at 2-6017.

Citibank has an early warning fraud detection that sometimes puts a block on your card if they suspect a fraudulent transaction. The block will be on your card until they can determine that the charge (s) is valid. Citibank may try to contact you by **phone, never by e-mail**. To be sure that the phone call is valid, just tell the caller that you will call Citibank back direct. At that point call the **customer service number on the back of your card, to discuss the card transactions, in question**.

Enterprise Rent-a-Car Office coming to Stony Brook University

Enterprise Rent-a-Car will be opening a satellite office on or about September 15th, 2006 at Stony Brook University. Hours of operation will be Monday to Friday from 8:00 a.m. to 5:00 p.m.; their office will be located in the basement of the Melville Library Bldg, Rm. E0304.

This on-site office will provide convenience in arranging your car rental needs. With a reservation, all Stony Brook staff, faculty and students are guaranteed that a vehicle will be ready for them at a pre-set time. All rental vehicles will be picked up at the on-site campus location. Rental vehicles will be returned to the on-site campus location or if needed, vehicles may be returned to a Long Island Enterprise location.

All aspects of the NYS Office of General Services (OGS) contract with Enterprise remain in effect. When making a reservation with Enterprise, **the Stony Brook corporate code JN0645 must be given** to receive the NYS contract rates.

OGS recommends that travelers purchase the damage waiver protection (sometimes referred to as CDW or LDW insurance from Enterprise). If you do not purchase CDW/LDW, the renter (agency) is responsible for damages to the rental vehicle and should notify their agency immediately to file a claim. **Any other type of insurance including PAI (Personal Accident Insurance) will not be reimbursed when renting a car.**

Depending on the funding source, the traveler should rent in the name of the State or Research Foundation and sign as agent of the State or RF.

This ensures that the traveler and State or Research Foundation are properly covered and eliminates any confusion regarding liability for coverage in the event of a claim.

For rentals within New York State, the traveler must submit proof of tax exempt status and an official letter of authorization signed by the traveler's supervisor on agency letterhead advising that the traveler is renting for business purposes only. The dates of the rental should also be included.

Depending on the funding source, the renter must present the following:

State: AC-946 Tax Exemption Certificate. This form is available at:

<http://www.osc.state.ny.us/agencies/ac946.pdf>.

Research Foundation: ST 119.1 Sales Tax Exemption Certificate is available by calling the Procurement/Travel Office at 2-6022.

Please note the NYS Visa Procurement card ***can not*** be used as a form of payment.

Campus Wireless Equipment Policy

Wireless services are required by various employees in order to facilitate the needs of campus departments to fulfill the University's goals for excellence in education, healthcare and research. The Procurement Office has instituted the following campus policy for the establishment and payment of wireless services and equipment funded by the Research Foundation, State and Stony Brook Foundation:

- Under no circumstance should employees of Stony Brook University, using Research Foundation (RF), State, or Stony Brook Foundation (SBF) funding, purchase telephone equipment, supplies or services at a local cellular service provider store or service center.
- All requests for new and upgraded cellular equipment (i.e. telephones, Blackberries, accessories, etc) and services (i.e. rate plans) must be submitted on either a RF, State, or SBF purchase requisition to the attention of Laura Beck in the Procurement Office. Laura will obtain the best pricing from an approved State-contracted provider such as Cingular/AT&T, Sprint/Nextel, or Verizon Wireless, based on the equipment and plan that best suits your departmental needs.
- Campus departments are required to contact [Laura Beck](#) (2-6229) prior to submitting a purchase requisition for the purchase of wireless equipment and upgrades.
- Monthly service fees paid by a State-funded account can be processed for payment by either:
 1. Submitting a web-requisition to the Procurement Office to encumber a blanket purchase order for the fiscal year or,
 2. Utilizing your University-issued procurement card.
- Monthly service fees paid by either the Research Foundation or the Stony Brook Foundation must be processed for payment by submitting either a RF or SBF purchase requisition to the Procurement Office to encumber a blanket purchase order for the fiscal year.
- Reimbursement of wireless service fees that currently exist on personal accounts and/or shared "family plans" will no longer be allowed. The Procurement Office will assist employees in establishing a business account that will be separate from the employee's personal account.
- Wireless equipment and services should be purchased at the discretion of campus departmental administrators (i.e. Deans, Chairs, Directors, et al) who, in turn, are responsible for ensuring and verifying that their employees are using the wireless services exclusively for business purposes. Personal use of University wireless equipment and services is strictly prohibited.
- If your wireless equipment requires repair and you have access to a university-issued corporate credit card you can utilize the corporate card to obtain the needed repair(s). If you do not have a corporate card you must submit a purchase requisition to the attention of Laura Beck in the Procurement Office in order to initiate repair process.

If you have any questions or concerns please contact either [Laura Beck](#) at 632-6229 or [Al DiVenuto](#) at 632-9838.

Record of Authorized Signature for Fiscal Transactions

It is a New York State Audit requirement that each year the University review and update the list of authorized signatures for every State and Stony Brook Foundation account. The Procurement Office is launching a new signatory system called Electronic Record of Authorized Signatures (E-RAS) that can store an image of your signature electronically. This system will also allow you to update your delegates on-line without the need to send in a signature form. Over the next several weeks those designated as account directors for State and SBF accounts will be receiving information relating to this new process.

Staples Business Advantage Program

Employees of Stony Brook University, Stony Brook University Hospital, the Long Island State Veterans Home and any other University affiliated offices are advised that the Staples Business Advantage Program was established strictly for the purchase of office supplies. Departments should not be using the Staples Program for the purchase of non-business related items such as over-the-counter medicinal supplies, food-related items and utensils, appliances, office furniture and equipment. In most cases such items can be ordered from vendors with whom the State and/or University has negotiated contract pricing at a substantially reduced cost. Please contact the Procurement Office at 632-6010 and ask to speak with a state buyer who can provide you with more information and assist you in placing your order. The New Year purchase order numbers for fiscal year 06/07 is as follows:

* State PO# **601401N** * Hospital PO# **290000** *LISVH PO# **642008**

State Relocation Policy

SUNY recently revised their relocation policy. State employees may now be reimbursed for actual moving household goods, personal effects and travel expenses that exceed the previous limit of \$3000. The appointee should select a carrier that is registered with the Interstate Commerce Commission. If a private mover is used, three written estimates must be obtained; the lowest of which will be used for reimbursement.

Relocation Expenses Eligible for Reimbursement

- A. Basic cost of moving household goods
- B. Basic cost of rental of trailers or trucks
- C. Cost of packing and/or unpacking of household goods or personal effects if such services are provided by the carrier

- D. Cost of transportation of the appointee and his/her family to the new location at the current New York State rate for the use of personally –owned vehicles, the mileage to be measured by the shortest highway route between two places of residence. Payment will be made for one vehicle only, or actual method of transportation used (e.g. airfare).
- E. Cost of additional insurance above the lowest valuation rate charged.

Unallowable Expenses

- A. Transportation of automobiles, boats and other motor vehicles.
- B. Household goods and personal effects in excess of 12,000 pounds
- C. Temporary housing and pre-move expenses.

Required Documents

- Standard Voucher (AC92) indicating state account number.
- Request for Reimbursement for Moving Expense Agreement (AC1099).
- Relocation Expense Authorization (SUSB 1401C).
- Original Bill of Lading, copy of Packing Slips and Proof of Payment.
- Statement of Automobile Travel (AC160), if requesting the cost of moving one personal automobile at the IRS allowable rate of \$0.445 per mile effective 1/1/06.

Claim for reimbursement must be submitted within one year of the effective date of the appointment. If employee terminates employment within one year of their appointment date all funds must be repaid back to the appropriate funding source.

2007 Per Diem Rates & Meal Allowance Schedule

Please note that all travel starting October 1, 2006 will follow the new **2007 Per Diem Rates** for lodging and meals for domestic travel. **Be advised that the borough of Queens is no longer included under the Manhattan rates. Effective November 1, 2006 Queens is listed with their own per diem rates.** The new rates can be found on the following websites:

<http://www.gsa.gov/> Go to Travel Resources click on Per Diem Rates

<http://www.osc.state.ny.us/agencies/travel/meals.htm>

<http://www.stonybrook.edu/procurement/employees/>

Click Travel, and then scroll down to Per Diem Travel Rates. You must indicate the year in your inquiry. These rate and meal changes apply to both State and Research Foundation travel.

Research Accounts Payable

STIPENDS

The status of the Participant must be clearly indicated on the form to prevent a delay in processing, i.e., U.S. Citizen, Resident Alien or Non-Resident Alien. Payments to Non-Resident Aliens are subject to immediate withholding at the rate of 30%. We have also received additional information from Human Resources and RF Central that states only J-1 or F-1 visa holders can be paid a participation or fellowship stipend. Please note that all Participants will receive a Form 1099 tax statements for U.S. Citizens and Resident Aliens from the Research Foundation indicating the amounts they were paid. All Non-Resident Aliens will receive a Form 1042S tax statement.

DEPARTMENT CONTACTS

Please indicate clearly on requisitions, the full name and telephone number of the person to be contacted for clarification on any items related to the requisition or Purchase Order. This will avoid any delays in payment.

IDC ACCOUNTS

We are currently in the process of closing out all encumbrances on Fiscal Year 05-06 funds on IDC award 35802. This affects the availability of IDC funds for the current Fiscal Year. Please contact Procurement immediately if there are any miscellaneous encumbrances that are not being used, and should be cancelled. If you are holding any invoices that can be paid please forward them immediately to Procurement.

Purchasing Contact: [Edith Koelln](#) 2-6068
Accounts Payable Contact: [Bill LaCascia](#) 2-6001

INDEPENDENT CONTRACTOR FEES: All departments requesting fees to be paid to Non-Resident Aliens are responsible for seeing if they can apply for exemptions under current Tax Treaty Provisions. Once the payment has been made and the withholding deducted this process cannot be reversed.

BLANKET ORDERS: We are requesting that Departments review and close all outstanding Blanket Orders that are more than a year old. This ensures that record keeping is more accurate, and helps expedite the close-out process of terming grants.

Austin Travel

Austin Travel has released its implementation of the *Cliqbook* an online booking tool for business travelers. Come join us on September 19th at 1:00 p.m. in the Wang Center Rm. 301 for an online demo presented by Austin Travel. Please RSVP to [Rosalie Makarick](#) at 2-6022 if you would like to attend.