



Procurement News

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Stony Brook University
Procurement Office

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[Update to SUNY Administrative Procedure Manual Item 7553 \(previously Item 300\)](#)

As a result of legislative action to help SUNY fulfill its educational mission, changes have again been made to Item 300 of the SUNY Administrative Procedure Manual. Simply stated, SUNY and the State Comptroller's Office have enacted new rules to simplify the procurement process and these procedures are now known as Item 7553.

The State does not differentiate between commodities, services and printing when it comes to procurement rules. There are no special rules differentiating how items are purchased. **Pre-approval by other State agencies (Office of the State Comptroller, Attorney General's Office) are no longer required on purchases under \$250,000.00 unless the transaction is sole/single source.** This one change should significantly shorten the timeline now required to provide for campus needs. Bid requirements have also changed greatly. This applies to all open market purchases (purchases made from other than preferred sources or State P-contracts). The thresholds and requirements are listed below:

1. **Purchases under \$20,000:** a statement of reasonableness of price and justification of the selection process should accompany your purchase requisition. If acceptable orders can be placed within five working days.
2. **Purchases from \$20,000.01-\$50,000.00:** require the procurement to be advertised in the New York State Contract Reporter. Orders accompanied by a statement of reasonableness of price and justification of the selection process can be placed 15 days after the ad appears in the publication.
3. **Purchases from \$50,000.01 to \$125,000.00:** require advertisement in the New York State Contract Reporter, and a minimum of three informal quotes or proposals and related analysis. Orders will be placed a minimum of 15 days after the ad appears in the publication and a thorough analysis review has been performed by the Procurement Office.
4. **Purchase from \$125,000.01 to \$250,000.00:** require the same advertisement in the New York State Contract Reporter, and a minimum of five sealed bids. Orders will be placed a minimum of 15 days after ad appears and a thorough bid analysis review has been performed by the Procurement Office.
5. **Purchases above \$250,000.01:** requires the same bid and advertisement requirements listed in Part 4, along with pre-approval of the State Comptroller and Attorney General's Office. This process takes a minimum of 45 days.

A statement of reasonableness of price and justification of award can be based on informal quotes via (telephone or fax), the demonstrated cost to other government agencies (GSA contracts), and/or historical cost or price comparison. When formal quotes are required, the assistance of the Procurement Office is highly recommended. All sealed bidding will be performed by the Procurement Office. The analysis for all formal quotes or bids will be performed by the Procurement Office, who may award/reject them based on their final analysis. If you have any questions relating to these changes, feel free to contact the Procurement Office at (631) 632-6010.

State E-Req Users

In order to facilitate the placing of your order in a timely manner web requisitions must contain all relevant information for example, correct vendor name, telephone number, fax number and vendor contact. In addition, whenever possible, you should reference the preceding fiscal year purchase order number on your requisition. All current quotations and backup must reference the corresponding requisition number and should be faxed to our Documents section at 2-2281.

We are also requesting when making your final approval that you indicate in the script prompt box what the main scope of the purchase is. Some possible examples:

- copier maintenance agreement
- conference registration
- blanket order for lab supplies
- Contract C001026: Boilermatic
- furniture
- computers

Please contact Mary La Corte at 2-9849 if you have any questions.

Purchases of Parking Validation Books - State & IFR

Effective 7/1/07, purchase orders for parking garage validation booklets and departmental parking cards for use in the garages are no longer issued to Stony Brook Foundation (SBF). These purchases are handled via Material and Services Requisitions for payments from State and IFR Accounts. The Material and Services Requisitions should be submitted to the Parking Garage for issuance of the parking passes. Purchases that will be paid by Research Accounts or Affiliates, will require the issuance of a purchase order, as per the prior practice, to IFR account 900917 (Parking Garages) and not to SBF.

Recycled Copy Paper

The Procurement Office will be soliciting bids for the purchase of 100% recycled copy paper, etc. Please submit your requirements, including quantities to Joanne Joy by September 30, 2007. If you have any questions, please contact Joanne at 2-6046.

OFFICE FURNITURE

CONTRACT AWARD NOTIFICATION: New York State Contract for Commercial Furniture (Statewide) award # 1001-G-Z, group #20915. There may be a short delay in the issuance of the new award for Furniture All Types (except Hospital Room and Patient Handling). Award # 01011 **WILL EXPIRE** on September 30, 2007 as scheduled. Therefore, you may want to place orders for needed furniture before that date.

State Independent Contractors

Departments should keep in mind that the State does not prepay for services. Also, in order to expedite payments please make sure that all fields are filled out and all pertinent supporting documentation is attached. The most common fields that people forget to fill in are, social security number, home address, state account number and/or authorized signature. It is also important to note that all Independent Contractor payments must go to Human Resource Services first for review and are then sent over to Procurement for payment processing. Payments aggregating over \$2500.00 should include a statement of price reasonableness and justification for selection. Please call Mary La Corte at 2-9849 if you have any questions or concerns.

Staples Business Advantage Program

Employees of Stony Brook University, Stony Brook University Medical Center, 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 07/08 purchase order numbers for the purchase of office supplies is as follows:

* **State** PO# 701001N * **Hospital** PO# 390000 * **LISVH** PO# 742008

Radisson Hotel in Holtsville

The Procurement Office is pleased to announce the Radisson Hotel in Holtsville as a preferred hotel of the University. The Radisson is offering a preferred rate of \$105.00 per night to anyone that is doing business with or on behalf of Stony Brook University, Stony Brook Medical Center and or the Long Island Veterans Home. The preferred rate will be extended to any vendors, consultants, contractors, visiting travel teams, alumni, and student parents affiliated with the University.

The \$105.00 preferred rate includes the following:

- Complimentary hot buffet breakfast
- Complimentary shuttle service to/from Stony Brook University and Hospital
- Complimentary high speed wireless internet access in rooms
- 24-hour fitness center
- 24-hour laundry facilities on site
- 24-hour corner pantry/gift shop on site
- On site restaurant, lounge and bar

To access the Stony Brook University rate a guest can call the hotel at 631-758-2900 and mention the preferred rate or can follow the on line booking instructions.

Instructions on how to book your reservations on the Radisson website.

- 1) go to www.radisson.com
- 2) enter Holtsville as city you are traveling to
- 3) enter 18490 in corporate account id section
- 4) click on view rates tab under Radisson Hotel MacArthur Airport
- 5) click on Stony Brook University rate that shows as \$105.00 per night
this will take you to the reservation field

STATE TRAVEL REMINDER

According to the Office of the State Comptroller, the Payee ID field is a required field when entering a payment on the SUNY system. Therefore, when completing a State Travel Voucher (AC132) for employee reimbursement of travel related expenses, it is required that the traveler indicate his/her Social Security # in the Payee ID field on the form. When completing a Standard Voucher (AC92) for a non-employee reimbursement of travel related expenses the non-employee must also indicate his/her

Social Security # in the Payee ID field on the form. No payments can be made without this information; missing SS #'s may cause a delay in payment.

2008 PER DIEM RATES AND MEAL ALLOWANCE SCHEDULE

Effective October 1, 2007, all travel will follow the new **2008 Per Diem Rates** for lodging and meals for domestic travel. **One notable change is the increase in the standard continental United States lodging per diem rate to \$70 from \$60. The standard meals and incidental expense rate remains the same at \$39.** The new rates can be found on the following websites:

<http://www.gsa.gov/perdiem>

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

<http://www.stonybrook.edu/procurement/employees/travel/> Click on Per Diem Travel Rates.

These rate and meal changes apply to State, Research Foundation and Stony Brook Foundation travel.

RESEARCH ACCOUNTS PAYABLE

Participant Stipends

In order to comply with tax reporting requirements, the status of the Participant must be clearly indicated on the Participant Stipend Form, i.e., U.S. Citizen, Resident Alien or Non-Resident Alien. For U.S. Citizens and Resident Aliens a W-9 form must be completed. In addition, Resident Aliens must attach a copy of their Resident Alien Card. These Participants will receive a 1099 Tax Statement. Non-Resident Aliens must complete and attach a W8BEN form. 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. Treaty Exemptions are not valid for Participant Stipends because it is considered "other" income by the IRS. Non-Resident Aliens will receive a Form 1042S tax statement indicating the payments made and taxes withheld.

Independent Contractor Fees

All departments requesting fees to be paid to **Non-Resident Aliens are responsible to find out 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 out all outstanding Blanket Orders that are more than a year old. This ensures accurate record keeping and helps expedite the close-out process of terming grants.

Direct Payments

Requisitions that are submitted as direct payments to vendors, with "invoices attached" must be actual invoices not statements. A sole source justification must also be submitted for items over \$10,000.00.

Reconciliation of Cash Advance for Foreign Field Expenses

Please submit an itemized listing of expenses claimed along with the conversion rate for receipts submitted in foreign currency. Original receipts should be submitted. In cases where expenses were incurred in the field and no receipts are available, a journal of expenses should be maintained.

IDC Accounts for Fiscal Year 06/07

Please review your accounts for any outstanding items, and contact the Procurement Office so that all open Purchase Orders can be resolved. For RF Purchasing contact Edith Koelln at 2-6068 and for RF Accounts Payable contact Bill LaCascia at 2-6001.

Reimbursement of Relocation Expenses

Reimbursement of relocation is a reportable expense and is subject to Internal Revenue Service (IRS) tax guidelines.

State

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 \$3,000.00. 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

- Basic cost of moving household goods.
- Basic cost of rental of trailers or trucks.
- Cost of packing and/or unpacking of household goods or personal effects, if such services are provided by the carrier.
- 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).
- Cost of additional insurance above the lowest valuation rate charged.

Relocation Expenses Ineligible for Reimbursement

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

Required Documents

- [Standard Voucher \(AC 92\)](#) indicating state account number.
- [Request for Reimbursement for Moving Expense Agreement \(AC 1099\)](#).
- [Relocation Expense Authorization \(SUSB 1401C\)](#).
- Original Bill of Lading, copy of Packing Slips and Proof of Payment.
- [Statement of Automobile Travel \(AC 160\)](#), if requesting the cost of moving one personal automobile at the IRS allowable rate of \$0.485 per mile effective 1/1/07.

Research Foundation

Research Foundation employees may be reimbursed up to \$3,000.00 for moving household goods and personal effects. Employees must attach the Research Foundation Relocation Expense Authorization and Payment Form and original receipts to a Research Foundation Purchase Requisition. The forms are available on the Procurement website.

For tax purposes, the IRS classifies moving expenses into two types:

Qualified (non-taxable)

- Reasonable costs for transportation and storage of household goods and personal effects.
- Travel and lodging payments for moving from previous residence to new residence.
- Use of personal car (receipted gas or \$0.20 per mile).

Non-Qualified (taxable)

- Moving expenses not previously listed such as meals and pre-move expenses.

Required Documents

- **Moving Expense Reimbursement Request and Authorization form (PROC0002)**

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

Call Rosalie Makarick at (631) 632-6022 for additional information regarding relocation guidelines.