

Procurement News **Stony Brook University**

March 2009

Procurement Office

volume 12 number 3

Procurement Satellite Office Located in Melville Library Bldg.

A Procurement satellite office has been established in room N4071 of the Melville Library. The satellite office is in operation Monday through Friday from the hours of 10:00 AM to 2:00 PM. The satellite office will be available to accept procurement documents (i.e. requisitions, cash payment vouchers, etc.) and to answer general procurement (purchasing, accounts payable and travel) questions. The Procurement satellite office telephone number is 632-3365.

Attention All Visa P-Cardholders and Department Heads!

Please be aware that there are some important changes to the Stony Brook University NYS/Citibank Visa Procurement Cardholder Guidelines, these changes to the guidelines are effective immediately.

Added to the Do Not Use Your Card for Listing

- **Do not** make any purchases or pay for memberships at Warehouse Clubs (such as BJ's, Costco etc.) for any reason, there will be no exceptions.

Supervisor Review and Signature on Visa Card Statement

- The cardholder's supervisor must review the monthly card statement and receipts and **sign the Visa cardholder statement before it is sent to the Procurement Office each month.**
- The supervisor must ensure that all transactions were for the official duties of the cardholder and were in accordance with the Stony Brook University/NYS/Citibank Visa Procurement Card Guidelines. The supervisor will ensure that the cardholder abides by security policies as well as applicable requirements related to certification and documentation of all P-card purchases.
- Cardholders who fail to meet the certification deadline and or the documentation requirements will have their cards suspended without further notice. The card will not be reinstated until all documents are received in Procurement and, in some cases the cardholder will be required to attend a cardholder re-training session.

Detailed information on the NYS Visa Procurement Card can be found on the Procurement Office website www.stonybrook.edu/procurement/employees/ under the Procurement Process Requirements Training Presentations tab.

Property Control

Assigning Asset decals from Property Control for State Purchases

As of 2/1/09, in addition to computers, monitors and printers valued over \$500 dollars, Property Control has added **Televisions** to this threshold. Property Control will assign asset decals for these State purchases.

During a recent audit it was identified that departments are purchasing equipment \$500 dollars and above on their Citibank Visa Procurement cards. As a reminder and as it has been communicated to the campus community on several occasions these purchases must be reported to Property Control when the equipment is delivered. Please provide Property Control with a copy of your receipt, budget number, building, phone and contact person. Please contact Anna Artale-Bruno should you have any questions @ 2-6306.

Courier Services

DHL

On February 3, 2009, DHL Express (USA), Inc. was awarded a contract for Lot 3 – International delivery. Award number 20029 has been amended to include DHL. Account set up and contact information are now included in the Contract Award Notification. Pricing is posted in a separate document on the OGS website.

Both can be viewed at the following link:

<http://www.ogs.state.ny.us/purchase/snt/awardnotes/7901120029can.HTM>

When shipping internationally, Authorized Users shall review the list of rates and services (including the percentage of discount) available from the pricing section of this Award and determine which contract will provide the best value for the service required.

UPS

To set up a UPS account for your department please call email Monica Butler at 877-222-3535, or email mwbutler@ups.com. Please indicate that you are entitled to the NYS Incentives Program under P contract PS64281. UPS is entitled to charge a pick up fee if you schedule a pick up outside of the agreed to time. To avoid additional pick up charges use the drop boxes on campus. Current locations are as follows:

- **Administration Building**, South side of building adjacent to loading dock, Pickup time: 5:15 P.M.
- **Student Activity Center**, Adjacent to bus stop, Pickup time: 4:45 P.M.
- **Health Science Center**, Next to the elevators, Pickup time: 5:00 P.M.
- **Life Science Bldg**, South Side of building next to parking meters, Pickup time: 5:30 P.M.

At this time, UPS is working on placing boxes in the near future at:

Frank Melville Library, Inside the building

South Campus, Location to be determined

Please email Mary La Corte at mary.lacorte@stonybrook.edu, to advise of any other possible locations that may benefit from a UPS box. This can be a big help for some offices, eliminating the need for a driver to go to their office, and for staff having to wait for the pickup.

Please keep in mind your receipt of invoice and approval to pay indicates that you have reviewed the charges for accuracy. Everyone should review the NYS OGS contract document and correlated pricing and accessorial pages at:

<http://www.ogs.state.ny.us/purchase/snt/awardnotes/7901120029can.htm>

Central Receiving

With all of the confusion surrounding DHL discontinuing their domestic service and FEDEX no longer on State contract we would like to remind you that Central Receiving still provides outgoing UPS Ground service for Main Campus, the Heath Science Center and the Basic Science Tower. A SUSB 114 form must be filled out for all outgoing shipments and faxed to 2-8332 for next day pick up. If your department is paying for the shipping charges a mail requisition must also be filled out. Any questions please call the Central Receiving office at 2-6290 or 2-6307.

Business and Appointment Card Change

Effective January 1, 2009 all business cards and 2 sided appointment cards for all University Departments will be printed at the Hospital Print Center, Level 1, HSC Z=8013. The phone number is 444-2642; the fax number is 444-8955. Maryhaven will **no longer** be authorized to accept any Stony Brook orders for these items. A revised requisition form for business/appointment cards (SUSB8002 01/09) is available on the Procurement website at <http://www.stonybrook.edu/procurement/employees/> click on "Forms and Publications" and follow the links to "Stationery" and then "Business cards". Complete the form and mail it to the HSC address listed on the form ("Distribution"). The new, lower prices for the cards are: \$13.00 for a box of 350 for 1 sided cards, and \$18.00 for a box of 350 for 2 sided cards.

The vendor for Letterhead, Envelopes and Memo pads is still Fantastic Graphics until further notice. The order form for these items is also on the Procurement website. Follow the same links as above except choose "Letterhead" instead of "Business cards".

Staples Business Advantage

The State contract for miscellaneous office supplies awarded to Staples Business Advantage is restricted to 7,000 items. Therefore, when using **State** funds and ordering through Stapleslink.com all non-contract items will come up with the following warning message:

Item Number XXXXX can not be added to your order. Your company has restricted the ordering of this item. Please contact your purchasing department if you wish to order this item.

Only Non-contract items should be submitted as a requisition through the web procurement system as they require the issuance of a separate purchase order. If you have any questions in this regard please contact JoAnn Sanford at 2-4155.

If you are using *Research Foundation* and/or *Stony Brook Foundation Funds*, *all items* are available to purchase, using the new company ID# 1047843NYC.

As of March 1, 2009, all Stapleslink account setup requests and updates should be emailed to Margaret Uyeno at margaret.uyeno@stonybrook.edu. Margaret can also be reached at 2-4573.

State Purchasing

Lapsing Funds Calendar

The Fiscal Year 2008/2009 lapsing funds calendar for State and IFR funds has been posted to the following website:

<http://www.stonybrook.edu/budgetoffice/lapsingfunds.shtml>

Unauthorized Purchases and Split Ordering

Any employee who directs a vendor to provide goods or services on behalf of the University without prior authorization from the Procurement Office is in violation of OSC and University policies. **Campus Departments are reminded that vendor invoices submitted along with a purchase requisition as “payment purposes only” will not be accepted for payment by the Procurement Office.** Should employees choose to proceed with such purchases they are reminded that they may be subject to disciplinary action and/or be held personally liable for any debt that is ultimately owed to the vendor/contractor.

If a campus department considers an order or service to be an emergency they must contact the Procurement Office for authorization prior to purchasing the goods or requesting the emergency service.

University departments are also advised to anticipate their merchandise/service needs for the entire fiscal year in order to avoid the submission of multi order requests for the same vendor, also know as “split ordering”. Departments are advised to submit one purchase requisition for each respective vendor. If and when additional items or services are required from the same vendor within the fiscal year, departments must submit an email to the respective buyer requesting an addition of goods or services to the original purchase order.

Executive Order 6

Governor David A. Paterson signed Executive Order 6 (EO6) on June 4, 2008. EO6 is designed to ensure the cost-effectiveness of contracts for personal services. More specifically, pursuant to EO6, the University must justify, with compelling reason(s), why the state work force of public employees wasn't used to carry out the services associated with the contract.

EO6 stipulates that state agencies should enter into private vendor contracts only after consideration of whether state employees can practicably meet the same need by providing services of the same or better quality for equivalent costs.

To that end, the Procurement Office Service Contract Section will now require any department requesting to enter into a Qualified Personal Service Contract that meets the minimum criteria of the EO6 to justify in writing, why the state work force wasn't utilized in the implementation of the services provided in the contract.

A Qualified Personal Service Contract shall mean any contract entered into by the University with any private party pursuant to State Finance Law 163, under which (a) the University believes that a majority of the costs of the contracts are attributable to compensation of the contractor's personnel; and (b) the University can reasonably anticipate that it will incur costs for the compensation of personnel of \$1 million or more.

A Qualified Personal Service Contract shall include contracts whose primary purpose is evaluation, research and analysis, data processing, computer programming, engineering, environmental assessment, health and mental health services, and accounting, auditing or similar services.

A member of the Procurement Office Service Contract Section will contact the end-user in all cases where a department wishes to conduct a procurement involving a service as describe in the EO6. Please access Executive Order 6 for additional information.

http://www.ny.gov/governor/executive_orders/xeorders/eo_6.html

OSHA 10

Effective July 18, 2008, Chapter 282 of the Laws of 2007, codified as Labor Law Section 220-h mandates that every worker employed in the performance of a public work project of at least \$250,000 shall be certified as having completed an OSHA 10 safety training course. The clear intent of this provision is to require that all employees of public work contractors receive such training prior to the performing any work on the project.

All contractors and subcontractors must attach a copy of proof of completion of the OSHA 10 course to the first certified payroll submitted to the contracting agency and on each succeeding payroll where any new or additional employee is first listed.

Proof of completion may include but is not limited to:

- Copies of bona fide course completion card
- Training roster, attendance record of other documentation from the certified trainer pending the issuance of the card
- Other valid proof

A certification by the employer attesting that all employees have completed such course is not sufficient proof that the course has been completed.

Any questions regarding this statute may be directed to the New York State Department of Labor, Bureau of Public Work at 518-485-5696.

SPOTA BILL

Requires Stony Brook University to collect and maintain certified payroll records for five years from the date of completion of the work.

Requires Stony Brook University to designate in writing an individual in their employ to be responsible to collect certified payrolls and review for facial validity. This person's name must be posted in a conspicuous location at the project site. Contact your University project manager for the campus designee.

A contractor that willfully fails to file payroll records to the Stony Brook University shall be guilty of a Class E Felony and subject to a civil penalty of up to \$1,000 per day.

The filing of payrolls to the Stony Brook University is a condition of payment.

Willful underpayments can be punished as a criminal offense ranging from a Class A Misdemeanor to a Class C Felony as follows:

- An employer failing to pay prevailing wages in an amount less than \$25,000 will be guilty of a Class A Misdemeanor.
- An employer failing to pay prevailing wages in an amount greater than \$25,000 will be guilty of a Class E Felony.
- An employer failing to pay prevailing wages in an amount greater than \$100,000 will be guilty of a Class D Felony.
- An employer failing to pay prevailing wages in an amount greater than \$500,000 will be guilty of a Class C Felony.
- Second violators within a five year period would be required to surrender their profits and would forfeit their right to receive further payment on the project.

Any person who willfully fails to file the requested payroll records within ninety days of a demand by the fiscal officer shall be guilty of a Class A Misdemeanor, provided, however, that a person who violates this subdivision after having previously been convicted of violating this subdivision within the past five years shall be guilty of a Class E Felony.

Moving Services on Contract

The Procurement Office currently has three vendors on contract for MOVING SERVICES. These Vendors should be utilized for any moving needs your department may have. Please contact Marie D'Andrea at 2-6066 for information regarding these three vendors.

- C001396 Avatar Moving Systems, Chris Noblit, 244-8686
- C001395 Meridian Moving Systems, Jeff Owen 737-2598
- C001394 Nassau World Wide Movers, Joe Biancanelli, 491-3600

Stony Brook Foundation

SBF Reimbursements

- Original receipts are required for all reimbursements. **Personal credit card statements are not an acceptable form of receipt for reimbursement** since they do not provide transaction details.
- Justifications for expense reimbursements must be detailed and include description and purpose of event for which items were purchased, attendees, location and any other details pertinent to the event or purchase.
- The Foundation does not reimburse for New York state and local sales taxes. A Foundation tax-exempt certificate must be presented for all vendor purchases.
- Account managers can not be the authorized signatory on their own reimbursement – Chairperson's or immediate supervisor's signature must be obtained.

SBF Check Run

Stony Brook Foundation expenditure checks are disbursed on a weekly basis by the Bursar's Office in the Administration Building. The weekly check run is completed by 2:00 PM each Wednesday, with an additional emergency check run every Friday at 2:00 PM. Please plan your payment needs accordingly in order to meet the weekly deadlines.

Research Accounts Payable

Research Reimbursements

- All pertinent documentation must be submitted to claim re-imbursements. This includes proof of payment, detailed receipt listing of items, and purpose of purchase.
- When asking for reimbursements for meetings that include catering, or are held in restaurants, a detailed listing of the food items ordered, list of attendees, and purpose of meeting is required along with proof of payment. There will be no reimbursements for alcohol.
- NYS sales tax is not reimbursable. Tax exempt certificate should be presented at time of purchase.
- Since purchased items become the property of the University they should be sent to an official University address. A detailed explanation should be provided, if they are shipped elsewhere.
- Whenever possible the Procurement process should be followed, and items for reimbursement should only be for items needed immediately for research purposes.
- There will be no reimbursement for holiday parties, and other personal expenses.

Research Foundation Checks

As part of ongoing efforts to reduce Research Foundation Central Office costs the daily printing of vendor checks will be reduced to three times a week. Effective Monday, January 26 Research Foundation prints checks on Mondays, Wednesdays, and Fridays only. Please note that electronic (ACH) payments for University employee reimbursements will still be available on a daily basis. University employees who receive Travel and other reimbursements from Research Foundation may want to enroll in this program to prevent any delays in receiving payments. Please contact Porshia Russell @ 2-6019 for further information

Consultant Payments

Requests for payments for RF Lecturer/Consultant Services to US Citizens and Resident Aliens do not have to be reviewed by Human Resources. If they are also seeking reimbursement for Travel Expenses, receipts must be provided, or these payments will be treated as taxable income.

All requests for payments to **Non-Resident Aliens** must be submitted to Human Resources for review. Non-Resident Aliens seeking payments should also submit Form 8233 if they are applying for exemption from tax with holding due to tax treaty exemptions. The tax with holding rate is 30% of the payment.

Travel

Euro Lloyd Travel, the State-contracted travel agency has informed the University that there are unused, non-refundable airline tickets that are eligible for credit. This applies to tickets that were booked and then cancelled through Euro Lloyd. Tickets booked on Southwest and Jet Blue are transferable to another traveler without additional costs unless the new ticket is more expensive. Other carriers such as Delta, United, American, US Air and Continental do not allow a transfer to another individual and a fee is associated for the new ticket. A trip can be booked up to one year from the original ticket date of issue. Please contact Euro Lloyd @ 2-7799 to determine your eligibility and terms of the credit. This applies to State, Research Foundation and Stony Brook Foundation funds. If you need additional information please contact Rosalie Makarick at 2-6022 or email at rmakarick@stonybrook.edu .

DANFORDS HOTEL & MARINA located at 25 East Broadway in the village of Port Jefferson, offers a special University rate of \$131 in accordance with the Suffolk County lodging per diem for a single/double room for guests visiting the University. You can set up direct billing with the hotel to eliminate any out of pocket expense for your guest. If your guest pays for his/her own lodging, the individual is also entitled to the “university rate” as long as he/she indicates that they are here for University business or an event.

University Rate is only available by calling Danfords directly at 631-928-5200.