

Procurement News

**Stony Brook University
Procurement Office**

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[SciQuest, Stony Brook's New eProcurement System](#)

The Operational Excellence Procurement Systems team announces the issuance of the first purchase orders through our new eProcurement system, SciQuest.

The goal of this new eProcurement system, dubbed “WolfMart,” is to make ordering faster and easier than ever before, as well as to create a unified portal from which to order using State, IDC, and RF fund sources. It will provide users an online shopping experience similar to that of other eCommerce sites such as Amazon, Priceline, etc., as well as include intuitive electronic order routing of approvals (workflow) and automated Accounts Payable/Receiving settlement.

The Procurement Systems team, in conjunction with the Strategic Sourcing team, has worked diligently to include the highest volume vendors in the automated system and will continue to add new vendors as the system rolls out.

As part of a five-year examination process by the Research Foundation of SUNY, SUNY, and several campuses, our Procurement Systems Initiative provides an “all funds” solution to the day-to-day process of ordering goods and services required for the operation of the University. The new system will replace the paper-based RF procurement process and the State E-requisition system, giving end users the ability to track their orders through both the NYS and RF purchasing cycles. It also supports the University’s ongoing effort to use spending power to cut costs, support minority and women owned business entities, and be more environmentally friendly.

After conducting a series of focus groups that included end users from varied departments and schools on campus to determine likes and dislikes of the existing systems, as well as determining “wish list” attributes that they would like in any new system, the Procurement team worked on the integration points to feed required information into the existing RF and SUNY systems and began testing. Thorough testing of the system enabled us to confirm that the integration was a success and that the product was ready to “go-live.” The first purchase orders were successfully processed through the system on November 14, 2011.

The pilot phase began on Monday, November 28. It consists of 16 campus departments utilizing the WolfMart system to place requests, requisitions and purchase orders. The Procurement Office will process orders natively through WolfMart as the pilot phase continues. It will utilize the workflow functionality of the system to get orders approved by supervisors, route special orders for other reviews (such as radio-isotopes to EH&S, work orders to CPDC, etc.), and place orders directly with vendors where no intervention from the Purchasing Department is required.

After a successful pilot phase, campus-wide rollout is to commence in mid-February 2012, culminating in a campus-wide implementation by June 30, 2012. The rollout will be accompanied by intensive training and support for all departments during the transition, along with additional testing to exploit the wide range of features and process improvements that the SciQuest product can offer us.

The Procurement Office will continue to provide updates as the planned goals and objectives of the implementation are reached and as we start new planned phases of the process.

OSC's new State Financial System (SFS) has been delayed until April 2012

The go-live date for the Office of the State Comptroller's (OSC) new State Financial System (SFS) has been delayed until April 2012. Therefore, all open current year encumbrances will currently remain encumbered. However, you can anticipate that all encumbrances will be disencumbered by early March along with a shutdown period of the State Accounting Systems. As more information becomes available from OSC and SUNY Central we will update the campus community.

Mail Services

The University Post Office located in the Student Activities Center has closed its operations. The following is being provided as alternatives to services and supplies previously provided by the USPS branch.

- Campus Residences will provide mailing services for Parcels, Priority, Express and First Class accountable mail. These services will be available in the Irving Residential Mailroom, which is located in Mendelsohn Quad from 9:00am to 3:00pm Monday through Friday. Call 632-4746 for more general information. Payment can be made by campus card and credit card. Campus Residences will provide these services for Students, Faculty, and Staff.
- Post Office boxes will be moved to a new location in the Library. All unit numbers will remain the same for current occupants. Please note: Access points may not be in the same location on the units, pay close attention to PO Box numbers. Box holders will not require new keys.
- First class stamps will be available at the Barnes and Noble Bookstore located in the Melville Library basement. Business hours are Monday to Thursday from 8:15am to 6:00pm, Friday 8:15am to 4:00pm and Saturday from Noon to 4:00pm. Call 632-6550 for more general information.
- The Seawolves Marketplace will sell books of US Post Office first-class stamps and individual international stamps at the service counter at the store entrance near SAC Food Court, Monday through Friday 10:00am to 5:00pm. Payment may be made by cash, Campus Cash and credit cards.
- For additional overnight service, Federal Express is located in the Melville Library basement. Normal business hours are Monday through Thursday 9:00am to 5:00 pm and Friday 9:00am to 4:00pm. Call 632-1831 for price and general information.

Bus service on campus: Suffolk County Bus Transit S60 provides transportation and bus stop to the East Setauket Post Office. For more information on bus schedules, visit www.sct-bus.org.

During intersession, the University Post Office will officially close and perform inventory. The Division of Campus Residences will perform the necessary steps and procedures during the holiday break of December 19, 2011 through December 30, 2011, and starting January 3, 2012, will begin to service the Campus Community by continuing with the hours of 10:00am to 2:00pm on Tuesdays and Thursday only. Normal business hours will resume when classes are back in session on January 23, 2012.

The Mail Services will continue to service the Campus Community for all their other mailing needs via the recharge system. If there are any questions or concerns, please contact us at 2-6231.

Prices for most Postal Services will change on January 22, 2012. These adjustments will include but not be limited to First-Class Mail, Package Services, Extra Services and International Mail. Some samples of the rate adjustments will be: One-cent increase from .44 cents to .45 cents on First-Class, one ounce - single piece, post-card rate to increase 3 cents from .29 cents to .32 cents, and International postage first ounce increased from .98 cents to \$1.05. For more information on these new postal rates, and a thorough breakdown of the classes and types of mail affected, please visit the US Postal Service website at www.usps.com/prices.

Corcraft Items

The Procurement Office has Corcraft 2012 calendars, mouse pads and canvas totes. Please email Michele Rindos at michele.rindos@sunysb.edu with your zip and let me know the items and quantity of each item you would like to receive. Items will be sent via interoffice mail.

Procurement Card Reminders

Certification Responsibilities

Cardholders must certify their statement on SUNY/AEPC each month that billable charges or credits are posted to their card. **Cardholders who fail to certify will have their VISA card suspended.** In order to have their card reinstated cardholders will be required to attend additional training.

Documentation Requirements

Cardholders must go on the Citidirect website to access and printout their monthly statement. Cardholders must obtain a vendor receipt for each purchase. The cardholders are required to send their monthly statement with all receipts attached to the Procurement Office after they have completed their certification on SUNY/AEPC. **Cardholders who fail to meet the certification deadline and /or documentation requirements will have their cards suspended without further notice. The card will not be reinstated until all documents are received in Procurement.**

***Do not pay sales tax; SUNY @ Stony Brook is Tax Exempt!**

For complete details of the of the Visa Cardholder Guidelines visit,
http://www.stonybrook.edu/procurement/employees/credit_card_programs.shtml

Research Accounts Payable

Research Foundation Lecturer/Independent Contractor Payments:

All requests for Research Foundation payments to Lecturers/Independent Contractors that are US citizens or resident aliens must have an IRS W-9 form attached. In addition resident aliens should attach a copy of their resident card. The W-9 form must be completed in full, indicating correct Social Security/TIN number, and signed by recipient. Research Foundation has stated that IRS requirements are becoming more stringent and it is critical that we have accurate information on file. The IRS can potentially fine the Research Foundation for reporting inaccurate information. If sponsored funds are being used the paperwork must be submitted to the Office of Grants Management for approval. If IDC funds are being used the paperwork can be submitted directly to the Procurement Office.

All payments to Lecturer/Consultants that are Non-Resident Aliens must have form W-8BEN attached in addition to copies of their VISA and other pertinent documents. If an NRA is applying for a tax treaty exemption, it must be completed at this time. Payments to Non-Resident Aliens should be forwarded to Madeline Riccardi in Research Payroll for review.

The Lecturer/Consultant form is available on the Procurement website. The form, when downloaded from the Procurement website, is automatically numbered; this enables the department and Procurement to keep track of the payment status. Departments must use these system numbered forms and not create their own hand-written numbers.

Wire Transfers and Foreign Drafts:

Domestic Wire Transfers are completed within a 24 hour time period.

Foreign /International Wires may take from 1day to several months, which can be due to several factors such as incorrect bank information, political situation in the foreign country, or lack of advanced banking system Please note that International Wires may have fees deducted by the corresponding and or foreign banks. These fees are not controlled by the Research Foundation. Foreign Drafts may take from 2-3 weeks to process, due to the fact that there is a 2 week waiting period from the date of the draft before it can be cashed. The Project will be charged a \$15.00 fee for each Foreign Bank Draft.

Human Subject Payments:

When submitting direct payments to Human Subjects, the signed consent form along with the subjects Social Security/TIN number must be indicated. Project Directors who received Cash Advances to pay the subjects directly should have the same documentation. Payments of over \$600.00 to Human Subjects within a calendar year are reportable income, and therefore Project Directors should keep track of these subject payments. Cash Advances for Human Subjects should be reconciled within 90 days, and receipts and unspent funds returned to the award.

Field Expenses:

Cash Advances for Field Expenses can be processed through the Research Accounts Payable section. The length of time in the field, as well as a brief description of the expenses that will be covered, should be indicated. The Cash Advance should be reconciled as soon as possible upon completion of the trip.

Housing Allowances:

In general, the Research Foundation does not provide for housing allowances or payment to employees for using their personal residences. In rare instances, housing allowances may be allowed by the sponsor. Written evidence documenting sponsor approval must accompany the requests for payment in all cases when such costs are claimed. If these costs are approved the housing allowance is taxable and must be paid through payroll and included in the employee's income and taxed the same as the employee's regular salary or wages

Tax Reporting:

Form 1099 will be mailed out to US citizens and resident aliens for reportable income paid by the Research Foundation calendar year 2011 by the end of January 2012.

Form 1042S will be mailed to Non-Resident Aliens for reportable income paid by the Research Foundation calendar year 2011 by the end of March 2012.

Reimbursements:

The following documentation is required when submitting requests for reimbursements.

- Original receipts/invoices, not copies
- Proof of payment
- Justification for items not shipped to a campus address
- Justification for reimbursement of taxes
- Names of attendees, and detailed itemized bill for restaurants. Please note there will be no reimbursement for alcoholic beverages.
- Purpose of purchase
- Personal items, such as holiday parties, gifts, etc. will not be reimbursed
- Complete phone bill, and proof of payment for bill being submitted on sponsored accounts only.
- Due to audit requirements, all payments for cell phones using IDC funds must have a Purchase Order encumbered. We cannot pay cell phones directly, or reimburse employees for cell phone usage on IDC funds.