

**Public Officers Law  
NYS State Employees  
doing Business with the  
State of New York**

The New York State Public Officers Law prohibits companies/corporations, whose owner is a New York State employee with ten percent or more of stock in that company/corporation, from selling goods or providing services to the State of New York valued over twenty-five dollars.

Public Officer Law Section 4.(a) states, **No statewide** elected official, state officer or **employee**, member of the legislature, legislative employee or political party chairman or firm or association of which such person is a member, or corporation, ten percentum or more of

the stock of which is owned or controlled directly or indirectly by such person, **shall (i) sell any goods or services having a value in excess of twenty-five dollars to any state agency, or (ii) contract for or provide such goods or services with or to any private entity where the power to contract, appoint or retain on behalf of such private entity is exercised, - directly or indirectly, by a state agency or officer thereof, unless such goods or services are provided pursuant to an award or contract let after public notice and competitive bidding.**

This paragraph shall not apply to the publication of resolutions, advertisements or other legal propositions or notices in newspapers

designated pursuant to law for such purpose and for which the rates are fixed pursuant to law.

**State Purchasing  
New Year Requisitions**

As a reminder, in order for the Procurement Office to facilitate New Year orders it is requested that when submitting New Year requisitions you provide a detailed description of either the services and/or products being ordered. In addition, whenever possible, you should reference the preceding fiscal year purchase order number on your requisition.

**Printing Services**

The Procurement Office has contracted with several vendors to handle your printing and copying needs.

## **Camillus Business**

### **Forms:**

Camillus Business Forms is the contracted vendor for all West Campus University forms. To place an order you must use the new Forms Requisition **SUSB 8001**, which can be downloaded from the Procurement website: [www.procurement.stonybrook.edu](http://www.procurement.stonybrook.edu) The new PO #, for State and RF use only, is 501155Q. Upon ordering a form from Camillus for the first time, complete the SUSB8001 form; attach a sample and mail to the address on the top of the requisition. The requisition must contain a valid account number and an authorized signature. Please remember to send all form requisitions directly to Camillus and not to Procurement. The Account Manager at Camillus is Rob Tedd; he can be reached at: 1-888-740-0201.

### **FedEx Kinko's** **Document Center**

Located on site at SUNY Stony Brook University, Lower Level of the Melville Library, phone #2-1831.  
<http://psg.kinkos.com/sunysb>

FedEx Kinko's has a complete set of solutions that will meet your needs. In addition to full-service color and black & white copying service, here are the major printing options available:

- Full service color and black & white digital printing ideal for everything from high quality brochures to professional-looking books.
- Color and black & white do-it-yourself express copiers offering the same quality as our full-service copiers; great for those low-volume copying jobs you need in a hurry.
- Full-size copies of architectural and engineering designs, plus other oversize prints and reproductions.
- Black & white and color enlargements of photos, artwork, company logos and more, up to 8 1/2" x 11" or 11" x 17" on FedEx Kinko's copiers. Poster-size enlargements, banners and signs are also available.

Beyond the hundreds of various printing options you'll find at FedEx-Kinko's, you'll find a host of binding and finishing options that make it possible to create literally thousands of different types of documents to learn how to create everything from a simple one-page flyer to a full-color bound document with tabs; or something even more complex.

### **Document Creation:**

Need a professional looking document or sign, fast? Not sure how to make your vision of that document a reality? Go to FedEx Kinko's! Their Document Creation Services help you produce professional looking documents, quickly and affordably. Whether you are creating brochures, newsletters, resumes or signs, their professional staff will work with you to create a layout for the high-impact communications materials you need. It doesn't take long. Typically, they'll have the initial layout to you in less than 24 hours.

For more information, or to order forms and price quotes, call the Kinko's manager directly at 2-1831.

### **Fantastic Graphics**

The vendor for 2 color printing and invitations with matching envelopes is Fantastic Graphics. They are located at 101 Verdi Street in Farmingdale, NY 11735. To contact Fantastic Graphics call 631-751-4144 or use their Fax number 631-751-3753. The vendor contacts for this company are Kathy and Lynn. A purchase requisition must be used to order these items. We do not have any contracts for 4 color printing. All orders between \$2,500.00 and \$19,999.00 require competitive pricing from at least 3 vendors. For orders over \$20,000.00 see our webpage at [www.procurement.stonybrook.edu](http://www.procurement.stonybrook.edu) for further instructions. The State Finance Law prohibits the use of brokers. All printers must own their equipment.

### **Stony Brook University Licensing Program**

The Stony Brook campus community participates in a licensing program that sets the guidelines for use of our logos and word marks on a variety of merchandise including items such as T-Shirts, mugs and other giveaways.

Stony Brook embarked on this program to ensure consistency, to protect the institution from unsavory business practices, and to raise funds for scholarships. Approved vendors have access to our style guide for their product designs.

Although many licensing programs focus only on manufacturers, the Stony Brook Licensing Program is open to smaller, independent brokers, such as specialty companies as well. This flexibility in the program allows these companies to continue to source from the best manufacturers available to them.

Prospective vendors are encouraged to visit Licensing Resource

Group (LRG's) website for an application at [www.lrgusa.com](http://www.lrgusa.com). The royalty rate is 8 percent, and is payable through LRG on all items including giveaways. Exemptions to the royalty are signage and uniforms. However, use of licensed vendors is still strongly encouraged.

All State/Research Procurement Guidelines (obtaining competitive pricing) must be adhered to. Please refer to the current listing of vendors prior to contacting a vendor for pricing <http://www.stonybrook.edu/u/sb/logos/vendors.shtml>. This listing is updated on a monthly basis. We suggest you contact the following certified NYS Woman owned businesses first.

- Classique Creations  
631-732-8620
- Promotional Marketing  
631-289-9780
- Rosalie Rosen  
Advertising Specialties  
631-654-9244
- Diamond Promotions Inc.  
516-674-0101

## **Research Accounts Payable**

### **2004 IDC Close Outs:**

The Procurement Office asks IDC Project Managers to have the appropriate personnel review all outstanding transactions so that the '04 projects can be closed out. This will also ensure that the new projects will reflect a more accurate balance. We will work with departments to:

- carry forward any specialized and recently issued Purchase Orders with future commitments
- disencumber excess balances left on open Purchase Orders

The Procurement Office is working to complete the resolution of outstanding items.

### **Direct any questions concerning:**

**Purchase Orders: Edith Koelln 2-6068**

**Accounts Payable:**

**Bill LaCascia 2-6001**

### **Departmental Purchase**

**Orders:** Project Personnel using Departmental Purchase Orders must submit their paperwork immediately

once the goods have been ordered from the vendor. Notify Accounts Payable of any changes or cancellations of the original order. Please note that Departmental Purchase Orders are subject to the restrictions printed on the order, and are each limited to one time use.

**Requisitions:** All requisitions submitted for payment must contain the first and last name of a contact person who can be notified via e-mail of any missing items or clarification to complete the payment process. All requisitions submitted for reimbursement must contain itemized bills and original receipts.

All requisitions that are submitted with "Invoice Attached" for direct payment of \$10,000.00 or more must still meet Procurement requirements, and require a sole source documentation or contract number. Payment documentation requires an original invoice, and not a statement.

**Cash Advances:** When requesting a Cash Advance please indicate the date that funds are needed, and if the check should be returned to campus or mailed to the recipient's home address.

### **Participant Stipends:** All **required fields must be completed** in order for

Stipend payments to be processed. Due to the fact that these payments are reportable, correct information regarding the Participant's Social Security number and tax status must be indicated. We are mandated to withhold 30% of all payments to Non-Resident Aliens. Forms missing this information will be returned to the department. All recipients will receive either a 1099 or 1042S tax statements for the calendar year in which payment was made. Other important items that will ensure that these payments are processed correctly are:

- Required date of payment
- If multiple payments, list amount & date of each payment

- Payment to be returned to campus, or mailed directly to participant

**Upcoming Changes in Forms Availability:**

The Procurement Department is currently working on providing the **Research Foundation Independent Contractor /Lecturer Form** on the Procurement website. We will notify the Campus Community as soon as this form is available.

**Research Foundation Moving Expense Reimbursement Policy**

Research Foundation employees may be reimbursed up to \$3,000 for moving household goods and personal effects. If approved by the department, a person may be eligible for reimbursement if he/she is appointed for more than one year to a full-time RF position. The claim must be made **within 60 days of the effective date of the appointment.** For tax purposes, the IRS classifies moving expenses into two types:

**Qualified (nontaxable)**

- Reasonable costs for transportation and storage of household goods and personal effects
- Travel and lodging payments for moving from previous residence to new residence
- Transportation costs for the employee and family members.
- Use of personal car (receipted gas or \$.15 per mile)

**Nonqualified (taxable)**

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

The Research Foundation does not reimburse employees for moving expenses for items not listed in the above categories.

Employees must use the Research Foundation’s Moving Expense Reimbursement Request and Authorization form, attach original receipts and submit to the Procurement/Travel office in the Library

W4559. To download the form go to ORACLE Business Application, click on EPSS: RF Help, Resources, Forms, Payroll, and scroll down to Moving Expense Reimbursement Request and Authorization Form.

**If an employee resigns within 12 months of the appointment start date, the moving expense reimbursement must be repaid to the project.**

(Business-related items such as lab equipment are not subject to this policy, and are reimbursed as a standard vendor payment and must meet all audit requirements.)

Call Rosalie Makarick at 2-6022 for additional information regarding relocation guidelines.

**State Relocation Policy**

According to the State University program, **State** employees may be reimbursed up to \$3,000 for moving household goods and personal effects. If approved by the department, a person may be eligible for reimbursement if he/she

is appointed for more than one year to a full-time State position. All claims for relocation expenses must be submitted **within one year of the appointment start date**. The appointee may request reimbursement for one way mileage, on one personal auto. Following State guidelines, the required documents are:

- Standard Voucher (AC 92) indicating state account number
- Request for Reimbursement for Moving Expense Agreement (AC1099)
- Relocation Expense Authorization (SUSB 1401C)
- Proof of payment i.e. cancelled check or credit card statement
- Original bill of lading with break-down of the charges and the amount paid
- Packing slips and/or inventory list
- Statement of Automobile Travel (AC160), if requesting the cost of moving one personal vehicle at the current IRS allowable mileage rate of 0.405

cents a mile (shipping a vehicle is **not** a reimbursable expense)

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.

**If the employee resigns within one year of the effective date of appointment, the employee must repay the State account to which it was charged.**

The above forms are available by calling Rosalie Makarick at 2-6022.

### **Central Travel Account (CTA)**

In order to use the State CTA account to purchase airline/rail tickets from Austin Travel for business-related travel, **only** a state account can be used to bill the University directly.

When using Research Foundation funds, user

should prepare a RF requisition, referencing quote and submit it to the Grants Management Office for approval.

If you intend to purchase your airline tickets using Stony Brook Foundation funds, you must submit a SBF purchase requisition to the Procurement Office; the CTA program will not accept SBF funding.

### **Travel Checklist**

In order to avoid a delay of travel expense reimbursement, here are some reminders for both State and Research travel according to audit requirements. Include the following receipts/documentation where applicable.

- Submit an **original hotel bill** with itemized breakdown of charges.
- When your lodging exceeds the federal per diem rate for either domestic or foreign travel, you should submit an over the maximum justification explaining why you

stayed at a particular hotel (e.g. conference hotel or site). The hotel rate will automatically be adjusted to the government rate if the justification is not submitted with the voucher.

- Indicate single rate when lodging is shared.
- Lodging location should be identified when only claiming meals.
- When traveling with a co-worker on either State or RF funds, each traveler must claim his own lodging, meals and registration fees.
- Attach a program/brochure indicating conference dates, location and daily schedule or agenda.
- Submit a **car rental receipt** (rental agreement). A justification is required when lodging is at conference site. Taxes

are **not** reimbursable in NYS.

- Business call justification: Document purpose, telephone number and party called. (For research funded travel **only**, a traveler is allowed **one** personal call per day not to exceed \$5.00).
- **Registration fees** require the registration form and one of the following: canceled check, copy of charge statement, or confirmation from the conference event indicating the dollar amount paid.
- The 2005 IRS mileage rate is \$0.405 per mile.
- **Telephone number** where a contact person can be reached

Visit the Procurement website: [www.procurement.stonybrook.edu](http://www.procurement.stonybrook.edu) to obtain additional information regarding State and Research Foundation travel policies, forms and **Travel Links** to domestic

and foreign per diem rates, Mapquest, meal schedule and foreign currency converter.

If you have additional questions regarding State travel policy and procedures, contact Rosalie Makarick at 2-6022.

### **NEW CAR RENTAL CONTRACT**

A new Passenger Vehicle Rental contract with **Enterprise Rent-A-Car** has been released. This contract with Enterprise is valid for all rentals within New York State and the United States. There is one major difference in the contract. **Due to a change in the New York State General Business Law, insurance is not automatically included in the rental rates.**

The Office of General Services recommends that travelers purchase the damage waiver protection (sometimes referred to as CD or LDW insurance from Enterprise). If you **do not** purchase CDW, the renter (agency) is responsible for damages

to the rental vehicle and should notify their agency as well as the OGS Bureau of Risk and Management (518-474-4725) immediately to file a claim. Claims must be filed within 20 days from the date of the incident.

When booking with Enterprise, the corporate code **NA24NYS must be given** to receive contract rates. These rates can be booked by calling Enterprise toll free at 1-800-736-8222, calling your individual branch or by visiting [www.enterprise.com](http://www.enterprise.com) and entering PIN: **STA**.

For rentals within New York State, the traveler must present proof of tax exempt status. 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 available by calling the Procurement/Travel Office at 2-6022.
- And a 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.

In addition, the agreement with Budget Rent-A-Car for all out-of-state rentals has been discontinued. All out-of-state rentals should now be used on contract with Enterprise.

**Stony Brook**  
**Foundation Cash**  
**Payment Vouchers and**  
**Purchase Requisitions**

To ensure that the Procurement Office accepts your Stony Brook Foundation (SBF) Cash Payment Vouchers and Purchase Requisitions and

processes them in a timely manner, please confirm that the expenditure meets the SBF account guidelines as established for your particular SBF account. Requests for expenditures that do not meet established criteria may not be processed and will be returned to your department. If you have a question or need a copy of account criteria, please contact Mary Tagliaferri at: [mtagliaferri@notes.cc.sunysb.edu](mailto:mtagliaferri@notes.cc.sunysb.edu)