



Procurement News

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Stony Brook University
Procurement Office

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SUNY Web Procurement

All State requisitions must be submitted using the new SUNY Web Procurement online requisitioning system. To schedule a training session please contact Mary Woodward at 2-9849. Training is mandatory for those creating the requisitions as well as for those who approve them. For those who have already been trained please remember to send an email to **Procurement_Vendorfile@notes.cc.sunysb.edu** if the vendor you are requesting is not currently on the SUNY vendor file. To discern which buyer is working on your requisition after it has been approved and sent please go to:

http://naples.cc.sunysb.edu/Admin/Procurement_SRA.nsf/167a72eb169fbab88525713200716171?OpenView&count=15000

One of the features currently not available on the new web procurement system is the ability to “**Budget Encumber**” purchase requisitions against the new fiscal year 06/07 budget. Should the new year budget not be available and distributed as of July 1, 2006, it is recommended that departments utilize their procurement cards to cover expenses until such time as purchase orders can be processed against new year funds. This functionality is expected to be available for fiscal year 07/08, along with other system improvements.

State Lapsing Funds

The last date to receive items to be paid against fiscal year 05/06 is Friday, July 14, 2006. The entire lapsing funds calendar is posted on the Procurement website at: www.stonybrook.edu/procurement to assist us in receiving all outstanding orders prior to July 14, please reply as quickly as possible to expediting reports sent to you by JoAnn Sandford. At this time, we are requesting that you forward all invoices with approval for payment to the Procurement Office Z=6000, as quickly as possible to facilitate payment. In addition, please review your 05/06 encumbrances to determine which ones are no longer needed and therefore should be disencumbered. To request a disencumbrance of funds, please send an email to JoAnn Sandford in the Procurement Office. Any 05/06 blanket encumbrance that needs to be re-encumbered in the new fiscal year 06/07 will require the submission of a new requisition.

Freight

To set up a freight account using DHL, FEDEX or UPS please visit the Procurement website at: <http://www.stonybrook.edu/procurement/employees/freight.shtml>

All changes to the contracts are posted in Campus Announcements. Please make sure you are reviewing your bill to make sure the correct government rates are being applied and that you are paying your bills within 30 days of receipt. Please be advised that it is not appropriate for University personnel to utilize their departmental freight accounts for personal use.

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.

Property Control

STATE-OWNED Equipment

Effective 4/1/06 the University Controller's office increased the dollar threshold from \$1,500 to \$5,000 of State-owned equipment for inventory control purposes as maintained in the Property Control System. This threshold standardizes the limit for all State equipment maintained on PCS.

Regarding this increase, it continues to be the responsibility of the campus to assign an asset decal to all equipment items, including those below the \$5,000 threshold. We will continue to issue the Property Control asset decals but the individual departments will be responsible for their inventory.

Research Accounts Payable

IDC Close Outs

New IDC projects are currently being established for the Fiscal Year July 1, 2006 through June 30, 2007. The establishment of new IDC projects annually ensures that expenditures are recorded in the proper fiscal year. This process will also expedite a review of the project to allow the close out of all stale dated items residing in the system. We greatly appreciate your assistance in this process.

For IDC projects terming June 30, 2006 the last day to submit non-emergency Purchase Orders will be June 16, 2006.

The Procurement Office asks IDC Project Managers to have the appropriate personnel review all outstanding transactions so that projects can be closed out in a timely manner. 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 so they can be transferred to the new project.
- Encumber new Purchase Orders against these newly established IDC projects.

The Procurement Office is working to ensure the resolution of outstanding items and help provide a smooth transition to the establishment of the new IDC projects.

Direct any questions concerning:

- **RF Purchase Orders :** **Edith Koelln 2-6068**
- **RF Accounts Payable:** **Bill LaCascia 2-6001**
- **RF Allocations:** **Esther Miller 2-9025**

Managers of IDC projects will be notified of their new IDC award/project numbers by the Office of Sponsored Programs and projects receiving annual allocations will be available for expenditure on July 1, 2006 in anticipation of the new year allocation.

Travel Reimbursements to Prospective Employees and Graduate Students

Lately we have been receiving requests to reimburse individuals who come to campus for interviews, submitted on the Research Foundation requisition form. The correct form to use for these Travel Reimbursements is the Research Foundation Consultant/Lecturer Form, indicating the Travel Expenses on line C, and the purpose of the visit in the descriptive field, i.e. interview. The Research Foundation Travel Form is to be used only for current Stony Brook employees and students.

Stipend Payments

All recipients should complete a W-9 to attach to the Stipend request form. In addition all Resident Aliens must supply a copy of their Resident Alien card. These payments to US Citizens and Non-Resident Aliens will be reported as 1099 Income. Payments to Non-Resident Aliens will be with held at the taxable rate of 30%.

Travel

New York City Lodging Rate Change

The Federal reimbursement allowances for New York City have been changed. Effective May 1, 2006 to June 30, 2006 the lodging rate will be \$212; July 1 to August 31 the lodging rate will be \$202; September 1 to September 30 the lodging rate will be \$282. The meal allowance remains \$64 for meals for all time periods. If you have any questions, please call Rosalie Makarick of the Travel Office at 2-6022.

CITIBANK TRAVEL ACCOUNT

In order to reduce out of pocket expenses for University Travelers, airline and rail tickets can be ordered directly through Austin Travel to secure State Contracted Rates.

STATE FUNDS: Contact Austin Travel to place order stating that you are using the CTA account, and give them the state account number you wish to charge for the expense.

RESEARCH FUNDS: RF traveler must contact Austin Travel stating they wish to use the CTA account and payment will be made using Research Funds. Obtain a written quote from Austin for the tickets. The Traveler must then prepare a Research Requisition and submit it along with the attached quote within 24 hours. Requisitions using sponsored funds must be submitted to the Office of Grants Management for approval. Requisitions using IDC accounts can be submitted directly to the Procurement Office. The Procurement Office must then confirm the order with Austin Travel in order for the tickets to be released.

Please note: SBF FUNDS CANNOT BE USED FOR THE CTA TRAVEL ACCOUNT

Travel Checklist

Here are some reminders for both State and Research Foundation travel that will avoid a delay of travel expense reimbursement. Please submit the following receipts/ documentation:

Registration: Proof of payment, a receipt is needed if paying onsite by cash or credit card. If registering online, proof of credit card payment.

Airfare: actual passenger receipt or if ticket purchased online include trip itinerary and proof of credit card payment.

Lodging: actual hotel bill or if booking online include dates, room rate, tax rate and proof of credit card payment. If sharing a room indicate the single rate.

Attach a program indicating conference dates, location and daily agenda.

Indicate Dates and Times of travel, Destination and Purpose.

Type or print clearly all pertinent information on voucher: name, address, social security #, zip code, signature of traveler and supervisor. When traveling on State funds include negotiating unit, account # and a signed automobile statement (AC160) when claiming personal car mileage.

Telephone number or email address where a contact person can be reached.