

Procurement News **Stony Brook University**

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Procurement Office

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Campus Catering Policy

Request for catering services by Campus Dining Services requires the issuance of a purchase order by the Procurement Office as well as the guaranteed number of guests **five (5) days prior to the event date**. In order for the Procurement Office to issue a purchase order campus departments must contact Campus Dining Services to request catering service for their event. Upon Campus Dining Services' confirmation an event sheet detailing the catering service will be provided to your department. This event sheet must be submitted to the Procurement Office along with a purchase requisition payable to **Lackmann Culinary Service, Inc.** with the required supporting documentation listed below:

- 1. Justification for food/catering service event**
- 2. List of attendees**
- 3. Copy of event flyer/announcement**

Research Foundation (RF)

For *Sponsored Funds* a RF purchase requisition, confirmed catering event sheet and required supporting documentation must be submitted to Office of Grants Management for review and approval. Once approved OGM will forward the requisition to the Procurement Office for the issuance of a RF purchase order.

For *IDC Funds* a RF purchase requisition, confirmed catering event sheet and required supporting documentation must be submitted to the Procurement Office for the issuance of a RF purchase order.

State

University departments must complete and submit an on-line electronic purchase requisition to the Procurement Office. The electronic purchase requisition number must be included on both the confirmed catering event sheet and required supporting documentation that must be forwarded to the Procurement Office for the issuance of a State purchase order.

Stony Brook Foundation (SBF)

University departments must submit a SBF purchase requisition, confirmed catering event sheet and required supporting documentation to the Procurement Office for issuance of a SBF purchase order.

State Purchasing

Printing Update

The University is committed to comply with Governor Paterson's Executive Order # 4, "**Establishing a State Green Procurement and Agency Sustainability Program**", requiring each State agency and authority to develop and implement programs and policies that will promote environmental sustainability and stewardship. These programs and policies will focus on reducing potential impacts on public health and the environment by supporting recycling, reducing or eliminating the use and generation of toxic substances, pollution and waste, increasing energy efficiency, and using renewable energy sources.

Effective immediately, all University **stationery** (letterhead, envelopes and memo pads) will be printed on **100% Mohawk recycled** paper.

The requisition form **SUSB 8000**, used to order University stationery has been updated on the Procurement website at <http://www.stonybrook.edu/procurement> . Click on "**Forms & Publications**" and then "**Stationery**". Please discard any and all copies of the older version of the form and use the **current form** when placing orders with the vendor Fantastic Graphics.

A separate requisition form **SUSB 8002**, is also available on the Procurement website for **business cards**. As of January of this year the business cards have been printed at the HSC Print shop. Please **mail** the form and your samples to HSC Print Center, Level 1, HSC Z= 8013 **DO NOT FAX** them.

Printing projects other than stationery and business cards, such as brochures, etc. all fall under the requirements of Executive Order #4 and compliance **is expected**. If a department is seeking a price quote from a vendor the intent should be to use **100% recycled paper**. The only exception is if the paper does not meet the form, function and utility. If the 100% recycled stock is priced prohibitively i.e. (price is at least 20% or more above the cost of a paper stock that is at least 30% recycled content) more than other products, then a stock with a recycled content of at least 30% may be used provided a **justification is included with the request**.

Grainger and MSC

When utilizing the State contract for the purchase of industrial supplies you must reference the Stony Brook Account # in order to receive the special state pricing.

The Stony Brook account number for Grainger is # 807233853

The Stony Brook account number for MSC is # 00203679

MSC Industrial Supply (MSCIS) frequently offers special daily sale prices on various items. Request to purchase goods from MSC Industrial Supply will be priced at the time your order is placed by the Procurement Office. If your department has a standing "blanket" purchase order with MSCIS and orders are called in on an "as needed" basis, your department must print an order confirmation and submit it to the Procurement Office at the time you approve payment of

MSCIS's invoice for that respective order. The submission of this supporting documentation is required for audit purposes to ensure MSCIS is properly billing ordered items.

MSC is now charging shipping for orders **under \$50.00**. Grainger still offers free shipping on all orders.

Wireless Services paid on State Funds

Monthly wireless service charges paid by a State-funded account can be processed for payment by either:

1. Utilizing your university-issued procurement card. ****Please send an email to Zulma Coffiner (2-6012) so that we can note your payment method in our files. *or***
2. Submitting a "zero-dollar" hard-copy "paper" purchase requisition, **each new fiscal year**, with the following information noted in the body:
 - Wireless service provider (e.g. Nextel, Verizon Wireless, etc.) account number
 - Departmental user name
 - Departmental contact name and telephone number
 - Wireless telephone number
 - State account number

Your requisition will be used for state account number reference and account signatory information only and will not result in an actual funding encumbrance. Wireless service charges will be paid against a master account and recharged back to your departmental account by the Accounting Department.

Upon receipt of a wireless service provider invoice please provide the following on the invoice and forward it to the Procurement Office for payment processing:

- State account number
- Authorized departmental signature

Using Verizon Wireless devices when Traveling out of the Country

Use of wireless communication devices outside of the U.S. is cost prohibitive. Charges are assessed per minute and roaming charges apply. Domestic air card plans do not allow for the megabytes required for international usage. If you plan on utilizing wireless devices while traveling outside of the country you should upgrade your current service to the Global Access Plan in advance of your travel dates. Pricing, regions and details can be found here: http://b2b.vzw.com/international/GlobalAccess/plans_coverage.html#monthly

Please contact your Verizon sales rep, Michael Mendonca at 516-458-9122 or John Mastromarino at 2-9779 if you require further information.

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.

FedEx Office Print Services (Kinko's)

A purchase order must be obtained from the Procurement Office when submitting a SBF printing request to the local FedEx Office on campus. Once you have received a quote from FedEx Office for your printing request forward an SBF requisition along with your quote to Lisa Rizzo in the Procurement Office. Lisa will issue a purchase order for your printing job; this PO# must be provided to FedEx Office (Kinko's) prior to the service being ordered.

Research Accounts Payable

Wireless Services

Effective October 1, 2009, there will be no personal reimbursements for wireless services (cell phone/Blackberry) or wireless equipment purchases processed using Research Foundation IDC funds. All wireless devices and service plans must be in the name of the University and all payments must be made directly to the vendor via a Purchase Order. The Procurement Office will assist employees in establishing a business account that will be separate from the employee's personal account. Please contact John Mastromarino in the Procurement Office at 2-9779 to establish a business account.

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.

Research Reimbursements

- All pertinent documentation must be submitted to claim reimbursements. This includes proof of payment, original detailed itemized receipt/invoice 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.
- When requesting reimbursement of phone/cable expenses, a complete bill must accompany requisition and proof of payment for bill being submitted.
- 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 justification 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.

Lecturer/Consultants

Please make sure when using the RF Independent Contractor/Lecturer form that the pre-numbered forms are used; these can be downloaded from the Procurement website. This procedure must be followed for processing and filing reasons and will help ensure locating the paperwork if problems occur, benefiting both the Procurement and the campus department. Reimbursements for Consultant Travel must include original receipts. Also please note, **Research Foundation Human Resources reviews only Consultant /Lecturers who are Non-Resident Aliens.**

Stipend Payments

When preparing the stipend form, it is imperative that the student's I-9 status be indicated, as US Citizen, Resident Alien or Non-Resident Alien. The Social Security or TIN number must be indicated; for Resident Aliens, a copy of the Resident Alien card must be attached. IRS Form W-9 or W-8 BEN is required for all Stipend Recipients. Payments cannot be processed without these documents.

IDC Close Outs

The Procurement Department is working to close out all remaining items for IDC accounts for F/Y 08-09. Please contact Alba Beltran in the Research Accounts Payable section at 2-6024, or Edith Koelln in Research Purchasing at 2-6068 if you have any questions.

Travel

Changes to State and Research Foundation Relocation Policy

State: State employees may be reimbursed for the actual moving costs of household goods, personal effects and travel expenses. No reimbursement shall be provided for household goods and personal effects in excess of 12,000 pounds. The appointee should select a carrier that is registered with the Department of Transportation. If a private mover is used, three written estimates must be obtained; the lowest of which will be used for reimbursement.

Research: The Research Foundation recently revised their relocation policy for RF employees. The total reimbursement for the moving of household goods & personal effects may not exceed 12,000 lbs, eliminating the previous limit of \$3,000.00.

For additional information on State or RF relocation policy visit: www.stonybrook.edu/procurement/ click on **For Employees**, scroll down and click on **Reimbursement of Relocation**.

New Pre-Screening Flight Procedure

The Office of General Services has informed the University that the Transportation Security Administration (TSA) is implementing and phasing in a mandatory Secure Flight Program that will require all airlines and travel agencies to collect and record information for every traveler who books a domestic or foreign flight: full name, date of birth, gender, passport #, nationality and alien registration card no (if applicable).

Effective July 13, 2009, Euro Lloyd, the State-contracted travel agency, has informed the University that they have implemented the Secure Flight Procedure. Upon receipt of the required information, the TSA will compare the information against the government watch lists and provide the agency/airlines approval to issue the passenger boarding pass.

Although this ruling is a mandate for airlines to provide this passenger data to TSA, travel agents will collect this information during the reservation process to better serve their customers and provide a smooth travel experience at check-in.

State and Research Foundation Travel Reimbursement Reminders

- Original receipts are required for all travel reimbursements. Personal credit card statements alone are not an acceptable form of payment since they do not provide transaction details.
- Submit original hotel bill with itemized breakdown of charges.
- Submit original passenger receipt or E-ticket with itinerary and proof of payment.
- NYS sales tax is not reimbursable. Submit a tax exempt form to vendor for lodging, car rentals and all other travel related expenses.
- Over the maximum justification is required when lodging exceed the allowable per diem rate. The hotel rate will automatically be adjusted to the government rate without a justification.
- Purchase Loss Damage Waiver (LDW) or Collision Damage Waiver (CDW) when renting a car from Enterprise, the state-contracted service provider or any other car rental agency. No other insurances are reimbursable.
- Registration fees require registration form and proof of payment such as canceled check or credit card statement.
- Attach a program or brochure indication conference dates, location and agenda.
- Business call justification should include, purpose and party called. For Research Foundation travel only, one personal call per day not to exceed \$5.00 is allowable.
- Telephone number or email where a contact person can be reached.

Visit the Procurement website at www.stonybrook.edu/procurement/ for additional information.