

Procurement News

Stony Brook University
Procurement Office

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Important Reminders for Visa P-cardholders

Cardholders are reminded that they should be sure to certify their Visa charges on AEPC each month by the requested deadline. After completing the certifications on AEPC, cardholders are required to send their Visa statement (with all original receipts attached) signed by their supervisor to: Maryann Dolan, Procurement, Zip 6000. Failure to comply will result in the suspension of your card.

The Visa Procurement card should only be used for official University business. The card **cannot** be used to purchase gifts, gift certificates, or greeting cards, for any purpose. The card **cannot** be used to fund parties or entertainment. The card **cannot** be used to make charitable donations. The card should **never** be used as a department “slush fund.”

The Visa Procurement card is a New York State program falling under the audit authority of the Office of the New York State Comptroller.

Enterprise Rent a Car

Enterprise

The State contracted car rental agency has a branch located in the lobby of the Student Union building on Main Campus. In order to reserve a car, you should call the campus branch @ 632-1133. If a sales representative is not currently available at the campus branch your call is automatically forwarded to the local Smithtown branch. The Smithtown branch will complete your reservation and will arrange for your rental car to be picked up on campus behind the Student Union.

We Car Program

In addition to the traditional rental car program already established with Enterprise. The University is currently exploring the use of the [WeCar program](#) (an hourly rental car program) with Enterprise. [WeCar](#) is a car sharing program for faculty/staff and students who are looking for an alternative method of transportation that lowers the cost and reduces the hassles of traditional transportation. To take part, faculty/staff and students would reserve a car online at an hourly rate for as long or as short as they need. The WeCar fleet would be available 24/7 at convenient locations at the University. Not only does car sharing reduce the number of cars on campus, most of the cars in the fleet are hybrids with greater fuel efficiency and lower emissions to further lessen the impact on the environment. We will continue to update the campus community as more details about the program become available.

State Purchasing

State Contracts

The Office of General Services has advised that there may be a potential lapse in contract coverage on the following Contracts:

- Panasonic - Reference Group 75346
- Sony Electronics - Reference Group 75343
- Fujitsu - Reference Group 75336

During this lapse in contract coverage, if you are planning to purchase this equipment using State Funds, you must follow normal purchasing procedures as follows:

Purchase of equipment with an estimated cost of:

- \$0 - \$20,000 requires a statement of price reasonableness/comparable quotes
- \$20,000.01 - \$50,000 requires advertisement of NYS Contract Reporter, as well as, a statement of price reasonableness, such as three written quotes
- \$50,000.01 - \$125,000 requires advertisement in NYS Contract Reporter, and a Request for quotation (minimum of three written quotes).

Please refer to our web site

http://www.stonybrook.edu/procurement/employees/purchasing/state_procurement for additional information. As soon as new contracts have been established, we will notify you. Any questions, please contact Joanne Del Bianco at 2-4340.

Large Equipment Orders

Please keep in mind that when obtaining a written quotation for the purchase of large equipment, the quoted shipping charges usually only cover delivery to the building loading dock. Delivery to a specific floor or room and installation may require an additional charge. Make sure you discuss your needs with the vendor so that the appropriate service/costs are listed on the price quote. While Central Receiving will deliver most equipment to a specific room, others may require special handling that must be arranged by the vendor.

Kyocera Mita printers and associated products are available thru State Contract PT62363

Kyocera's ECOSYS® Technology provides **Stony Brook** with printing solutions that incorporates long life consumables at a low cost per print. Kyocera's ECOSYS printers include a durable imaging system using long-life drums, capable of handling up to 500,000 prints. These long-lasting drums are distinctly separate from the toner, eliminating the need to replace the drum when toner is depleted. By eliminating the need to continually replace expensive cartridges, Kyocera printers do their part in **reducing environmental waste**. Brothers II Business Machines a Long Island based authorized Kyocera dealer supports these printers in addition to other value added resellers listed on the state contract at:

<http://www.ogs.state.ny.us/purchase/snt/awardnotes/7551420397can.htm>

Property Control

Please be advised that when equipment is purchased for off-campus use the user is required to complete and return the Property Control form “**Off Campus Use Form, SUSB2640**”. Property Control records the information into your PeopleSoft Human Resource file. Property Control **must** be notified when the equipment is returned to Campus in order for the company property to be removed from your HR file. Please call Anna Artale-Bruno at 2-6306 should you have any questions.

To obtain a copy of the Off Campus Use form click on the following link:

[http://naples.cc.sunysb.edu/Admin/HRSForms.nsf/f232d3967f29b79d85256e1600106088/1a7f5544672c566585256eb40046b175/\\$FILE/SUSB2640.pdf](http://naples.cc.sunysb.edu/Admin/HRSForms.nsf/f232d3967f29b79d85256e1600106088/1a7f5544672c566585256eb40046b175/$FILE/SUSB2640.pdf)

Stony Brook Foundation

IRS W-9 Form

In order to avoid IRS reporting penalties, the Foundation now requires an IRS W-9 Form (Request for Taxpayer Identification Number and Certification) to be submitted by campus departments for all newly established vendor relationships. The W-9 Form, found on the IRS' website (www.irs.gov), must be completed by the vendor and submitted with the respective Foundation purchase requisition or cash payment voucher. Failure to submit the required IRS form will result in delay of purchase order issuance and/or vendor payment.

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. This 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 not collecting accurate 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 the form **W-8Ben** attached in addition to copies of their VISA and pertinent documents. If they are applying for tax treaty exemptions, it must be completed at this time. Payments to **Non-Resident Aliens only** should be forwarded to Madeline Riccardi in Research Payroll for review.

The Lecturer/Consultant form is available on the Procurement website. The forms when downloaded from the Procurement website are automatically numbered, which enables the department, and Procurement to keep track of the payment. Departments must use these numbered forms, and not create their own hand-written numbers. This will help to ensure that payments will not be delayed.

Wire Transfers and Foreign Drafts:

Domestic Wire Transfers are completed within a 24 hour time period. Foreign/International Wires may take from 1 day to several months, which may be due to several factors such as, incorrect bank information, political situation in the foreign country or lack of an 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.

Reimbursements:

The following documentation is required when submitting requests for reimbursements. Please print name clearly on all reimbursements.

- Original receipts/invoices, copies are not acceptable
- Proof of payment
- Justifications for expense reimbursements must be detailed and include description and purpose of items purchased
- Justification for items not shipped to a campus address
- Justification for reimbursement of NYS sales taxes
- Reimbursements for catering or restaurant charges require names of attendees, purpose of meeting and detailed itemized invoice listing the food items ordered. Please note there will be no reimbursement for alcoholic beverages.
- Reimbursement for on-line service providers, (i.e. cablevision) must include a complete bill along with proof of payment. In addition supervisor must furnish a signed written statement authorizing the use of the on-line service as an appropriate business expense.
- Reimbursement of cell phone charges on sponsored accounts must include complete bill and proof of payment.
- Personal items, such as holiday parties, gifts, etc will not be reimbursed

Human Subject Payments:

When submitting direct payments to Human Subjects, the signed consent form along with the subjects Social Security/TIN number should 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.

Travel

State and Research Foundation Travel Reimbursement Reminders

- Original receipts along with proof of payment 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.
- Original hotel bill with itemized breakdown of charges and proof of payment.
- 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 exceeds 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) only 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 a registration form and proof of payment.
- Attach a program or brochure indicating conference dates, location and agenda.
- Business calls justifications should include purpose and party called
- Research Foundation travel only allows one personal call per day not to exceed \$5.00
- Include a telephone number or email where a contact person can be reached.

Additional information may be found on the Procurement website at:

www.stonybrook.edu/procurement/

2010 Per Diem Rates and Meal Allowance Schedule

Effective October 1, 2009, all State, Research Foundation and Stony Brook Foundation domestic travel follow the new **2010 Per Diem Rates** for lodging and meals. **Most locations will see an increase in the standard meal allowances.** In locations where the per diem rate decreased, reductions to maximum rates will be effective November 1, 2009. The new rates can be found on the following websites:

<http://www.gsa.gov/perdiemrate>

<http://www.osc.state.ny.us/agencies/travel/meals.htm>

<http://www.stonybrook.edu/procurement/> Once on the Procurement website click on the following: For Employees, Travel, Per Diem Travel Rates and then Domestic Per Diem Travel Rates. Be sure to indicate the correct year in your inquiry.

Should you have any questions please feel free to call Rosalie Makarick of the Travel Office at 632-6022.

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. Employees must attach the Research Foundation Relocation Expense Authorization and Payment Form and original receipts to a Research Foundation Purchase Requisition. The forms are available on the Procurement web site.