WB Mason and State P-Card Orders

Stony Brook University Procurement Department is pleased to announce that W.B. Mason can now support P-Card payments for WolfMart orders. Effective August 1, 2019, State Visa Procurement Cardholders should select their P-Card as a payment method when ordering from W.B. Mason in WolfMart. If you do not have a State Visa Procurement Card, you will continue to have the ability to forward your shopping cart to a user within the department that is a P-Card holder. If you are using Research Funds, you should continue to follow the current purchasing procedures and should not select a credit card for the billing/payment option within WolfMart.

Note to ALL W.B. Mason shoppers: Please be aware that W.B. Mason has changed the way they send out order-related emails. W.B. Mason will now be sending all order status updates (order acknowledgements, invoices, credits, etc.) to the email address referenced on the order. This will be for all shoppers (both State and Research Foundation). If you place an order using your P-Card, you should keep these emails as support for your monthly P-Card certification. If your order was not placed with a P-Card, you can delete/disregard these invoice emails.

To apply for a State Visa Procurement Card, please review the guidelines and application, & obtain necessary approvals prior to submission.

Please Note: All purchases must be made in accordance with NYS Procurement Card Guidelines, SUNY, and Campus Policy.

Click HERE for detailed instructions to assist WolfMart users in successfully completing a W.B. Mason requisition using their State P-Card as the payment method. For WolfMart related questions, please call (631) 632-6010, email WolfMart_Help@stonybrook.edu, or visit our WolfMart Training Site.

Amazon WolfMart Shoppers

Amazon Business customers will now benefit from Business Prime Shipping! Business Prime Shipping provides FREE 2-day shipping on eligible Prime items, no matter the order size. Products eligible for Business Prime will be designated with a Prime logo prime on the product page at checkout. For Amazon Business punch-out instructions, FAQ’s and Customer Support contact information, click HERE.
Dell Purchases using State Funds

Dell purchases made with State funds require Mini-bid RFQs (request for quote) in order to make use of the NYS OGS contracts. For Procurement to issue the mini-bid RFQ, we need the computer's configuration details, which are outlined on Dell's quote. Please be sure to include Dell's e-quote for your requirement with your requisition.

You can obtain Dell's quote once you have chosen the configuration and have added it to the cart.

- Just before you are ready to "Create the Order Requisition" (green box), please choose "Save as E-quote" (blue box right below it).
- The next screen will ask you for your e-mail address and to name the quote (for your reference).
- Dell's quote will be emailed to you.
- Please save it as a pdf so that you can attach it to the requisition.
- The last step is for you to "Create the Order Requisition" (green box) and attach it to the requisition as you complete it.

This helps us to be able to issue the Mini-bid RFQ without delay so that we can promptly issue the PO for you. Thank you!

Please call Maria Callegari (632-4155) if you have questions about this or about IT Procurements with State funds.
**Travel Reminders**

**Travel Status:**

An employee is in travel status when the employee is:
- Engaged in official State business
- At a distance of more than 35 miles from both their designated official station and their place of residence. Employees must obtain appropriate approvals prior to traveling

**Travel Ban to North Carolina and Mississippi:**

Please note that the NYS Governor’s ban on Travel to North Carolina and Mississippi is still in effect. This directly affects all travel using State and IDC funds. It also affects certain State Funded sponsored accounts.

**Day Trip Reimbursement:**

When an employee is in “Travel Status” for the day, the employee may be reimbursed for breakfast and/or dinner based on departure and return times. Travelers are entitled to reimbursement for breakfast if they leave before 7:00 AM and/or for dinner if they return after 7:00 PM. Travelers without meal receipts are reimbursed $5.00 for breakfast, and/or $12.00 for dinner. Travelers with meal receipts are reimbursed up to the maximum amount of the meal per diem allowance specified for the particular area related to the travel destination. The meal per diem allowance is apportioned for breakfast & dinner. Day trip meal reimbursements are reportable as income to the IRS on your W-2 statement at year’s end.

Please click on the following link for current per diem meal allowance breakdown:  https://www.osc.state.ny.us/agencies/guide/MyWebHelp/Content/XIII/4/D.htm

**When is it Appropriate to use a Personal Owned Vehicle (POV) for Travel?**

When traveling on behalf of Stony Brook University, travel should be by the most efficient and cost-effective method of transportation available. **When a vehicle is required for travel trips over 100 miles (roundtrip), employees are to determine the most economical method of transportation; a rental vehicle or a POV.** When using a POV for business, you will be reimbursed at the current standard IRS business mileage rate at the time of travel. This rate includes all charges for gasoline, oil, accessories, repairs, depreciation, anti-freeze, towing and insurance on your car. No other charges will be reimbursed. Effective January 1, 2019 the current standard IRS mileage reimbursement rate is $0.58 per mile. Travelers on State funds are required to document their mileage using the AC-160 form.

The Office of General Services (OGS) has Rental Vehicle agreements with Enterprise, National and Hertz. To assist travelers in determining whether a rental vehicle or POV is the most cost effective method of transportation, a “**Trip Calculator**” tool can be used and is located at: https://www.ogs.ny.gov/bu/ss/trav/calculators.asp

Employees who choose to use their POV when a rental would have been more economical, will be reimbursed at the lesser of the two costs. The “trip calculator” tool provides the allowable mileage to be claimed when using this approach.
When supported by proper justification, personal vehicles may be used due to extenuating circumstances. The justification, submitted with supervisor approval, must clearly state why the use of the personal vehicle was the most cost effective/efficient option.

**SBU Air Travel Policy: State and IDC Funded Travel:**

University travelers are required to exercise the same care in incurring air travel expenses that a prudent person would exercise if traveling on personal business, and therefore should obtain the lowest cost coach accommodations available.

**Coach Class Policy**

1. All official domestic business travel within the U.S. 50 contiguous states must be reserved at the lowest applicable coach class air fare.
2. All official international business travel under 14 hours, including stopovers and change of planes, must be reserved at the lowest applicable coach class air fare.

**Business Class Policy**

Business Class accommodations for international business travel may be authorized/approved if any of the following apply and pre-approval has been obtained by the area Dean or Vice President. The approval must be in writing and attached to your travel reimbursement request.

1. Where the origin and/or destination are international, and the scheduled flight time, including non-overnight stopovers and change of planes, is in excess of 14 hours and you are required to report to work the following day or sooner.

2. In order to accommodate a medical disability or special need. This will need to be supported with a written statement and remain on file in Human Resources. A medical disability/special need must be certified annually in a written statement by a competent medical authority. However, if the disability/special need is a lifelong condition, then a one-time certification statement is required. Certification statements must include at a minimum:
   A. A written statement by a competent medical authority stating that special accommodation is necessary;
   B. An approximate duration of the special accommodation; and
   C. A recommendation as to the suitable class of transportation accommodations based on the disability.
3. When your transportation costs are paid in full through agency acceptance of payment from a third party (i.e. SUNY Korea).

*You may upgrade to other than coach-class accommodations at your personal expense, including through redemption of personal frequent flyer benefits.*

**Per Diem Rates**

Please be advised the General Services Administration (GSA) announced that the FY 2020 Domestic per diem reimbursement rates are now available at http://www.gsa.gov/perdiem. The rates are effective October 1, 2019.
Maximum lodging rates are inclusive of any resort fees charged by the hotel. When booking a room, always ask if there is a resort fee and if it’s required. If not required, deny the fee. If required, then the resort fee needs to be factored into the nightly cost to determine if the rate is over the per diem.

See example below:
Based on location of Scottsdale, Arizona, the maximum nightly per diem for lodging is $121. If the hotel indicates that they have rooms at the per diem rate of $121 … but they also charge a nightly resort fee of $25 … making the room rate $146.00 … then this hotel is over the per diem rate.

Traveler should then be looking at other hotels in the area, or must be able to justify the cost above the per diem and seek prior approval from supervisor/account manager.

Meal Eligibility Requirements: On the day of departure, you are eligible for breakfast if departure occurs before 7:00 am. You are eligible for dinner if departure occurs before 6:00 pm. On the day of return, you are eligible for breakfast if the trip ends after 8:00 am. You are eligible for dinner if the trip ends after 7:00 pm. Lunch is not reimbursable. When a meal such as a breakfast, dinner, banquet or buffet, is included or provided at a conference, the meal is not reimbursable. The conference agenda must be provided with your reimbursement request to confirm that meals are not included.

The State Department sets Foreign per diem rates. These rates can be found at https://aoprals.state.gov/web920/per_diem.asp. If a paid hotel receipt is not provided, the flat rate for foreign per diem will be reimbursed at the rate of $50.00 per day. This rate is all inclusive of lodging and meals.

New York State Citibank Procurement Card

Important Updates & Reminders:
• Please keep your Procurement Card in a secure location at all times.
• DO NOT share your Procurement Card, account number, and/or passwords.
• Monthly certifications are due by the designated deadlines. Failure to certify by the designated deadline may result in suspension of your P-Card privileges until your certification packet has been received and completely reviewed. Please note that your transactions will be A/P certified to your default account; therefore, cardholders will be responsible for requesting a journal transfer to the intended account if necessary.
• When possible, Cardholders should maintain packing slips/bills of lading for each purchase and record the date goods/services were received & by whom.
• After your certification is complete, you are asked to interoffice the following by the designated due dates:
  o Your original signed Statement Information Form
  o Your Citibank Cardholder Statement (found on the Citi Manager website)
  o All corresponding itemized receipts (referencing the vendor name, items purchased, & cost)
  o Receiving information
  o A business purpose for each transaction (the Monthly Summary Log was created to assist you in doing so)
• Justifications, approvals, and/or supporting documents (event sheets, lists of attendees, freight bills, certified payroll, etc. if applicable)

• Immediately report lost/stolen cards to Citibank and your Procurement Card Administrator.

• Main Campus Amazon purchases should be made via the WolfMart system; certification packets should contain Amazon invoices (WolfMart requisition printouts are not sufficient).

• Main Campus Cardholders should select their P-Card as a payment method when ordering from W.B. Mason in WolfMart. Click here for detailed instructions and call (631) 632-6010 for assistance.

• P-Card Supervisors are required to:
  o Review the most current guidelines and submit a signed acknowledgment form (if you have not already done so)
  o Develop/Implement a plan for card oversight
  o Be cognizant of the Cardholder’s account parameters (including but not limited to account access and transaction limits)
  o Ensure that all items purchased are received and accounted for

• Notify your Procurement Card Administrator if:
  1. Your supervisor changes
  2. You will be going on extended leave/vacation
  3. Accounts need to be added/removed from your profile
  4. The Account Director and/or Signatory Delegates for the budget accounts assigned to your P-Card profile have changed
  5. You change departments
  6. You terminate employment
  7. You no longer need the card

Please visit the Procurement website for complete guidelines and feel free to contact Gerardina Paduano, Procurement Card Administrator at 2-6017 should you have any questions or concerns.

Contact Information:
Procurement Office: 631-632-6010
http://www.stonybrook.edu/procurement