Attention WolfMart Users

We are excited 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 currently have a State Visa Procurement Card, shoppers will continue to have the ability to forward their cart to a user within the department that is a P-Card holder.

To apply for a State Visa Procurement Card, please review the guidelines and application, & obtain necessary approvals, prior to submission. If you are using **Research Funds**, you should continue to follow the current purchasing procedures and will **not** select a credit card for the billing/payment option within Jaggaer.

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

Detailed instructions will be available on the WolfMart Message Board and WolfMart website, 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**.
WolfMart Training

Please check out our **Online Training with step by step instructions** located on the log in page under the Training Tab.  [https://wolfmart.stonybrook.edu/training](https://wolfmart.stonybrook.edu/training)

**New, In Person Training Classes** for beginner users is scheduled for early July. Training will take place at the Procurement Office which is located at Research & Development Park, RSS Building Room 107. You can register online at:  [https://www.stonybrook.edu/wolfmart/training/index.php](https://www.stonybrook.edu/wolfmart/training/index.php)

If you have been using the WolfMart system for several months, and have questions or issues regarding WolfMart, please contact margaret.uyeno@stonybrook.edu to set up an advanced training session to review your issues.

Should you have questions or comments please feel free to contact Margaret Uyeno or at 2-4573 or send an email to Wolfmart_Help@stonybrook.edu

**Which WolfMart Form should I use?**

**Non-Catalog Form:** For commodities not in the punch out catalog. Use the blue link at the top of the WolfMart home page under “GO TO”.

**Service Request Form:** For repairs, maintenance agreements, printing, software agreements, and anything involving labor.

**Blanket Order Request Form:** When purchasing commodities provided over a specific period of time for contracted or established quantity/pricing. All Blanket Order requests will be reviewed in Procurement.

**Single/Sole Source Form:** When competition would otherwise be required, but is not feasible due to the sole source, single source, or emergency nature of a commodity. **Do not use this for Service Single/Sole Source Procurements: use the Service Request Form instead.**

**Catered Food – just the basics!**

All catered food requires a purchase order in advance of the event. (Do not use a p-card for catering).

Plan your event with these three questions in mind:

- **WHAT?**  Written quotation from vendor
- **WHO?**  List of invitees/attendees
- **WHY?**  Justification/Description of Event

Confirm you are within the allowable daily meal rates per person:

- Breakfast: $14.00
- Lunch: $25.00
- Dinner: $57.00
Lapsing FY 2018/19

This fiscal year the lapsing funds committee extended the due date for the submittal of State requisitions to June 14th. We hope this benefitted your department in the purchase of your last minute needs. This two week extension was targeted specifically to address purchases under $5,000, however there were a significant number of requisitions submitted above that threshold. In future years, the $5,000 limit will be stricter enforced.

For your benefit some punch-out suppliers (WB Mason in particular) remained open for state orders until June 21st.

The Procurement Lapsing team will review and evaluate the accommodations we made this year for our customers and make decisions for next year based on what worked well and what can be improved to enhance the shopping experience of the Stony Brook University.

Upcoming Lapsing Funds Dates

<table>
<thead>
<tr>
<th>Date</th>
<th>Description</th>
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<tbody>
<tr>
<td>7/5/2019</td>
<td>Last day for receipt of items to be paid against fiscal year 18/19 funds.</td>
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<tr>
<td>7/26/2019</td>
<td>Last day to submit all invoices to Procurement for processing.</td>
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<tr>
<td>8/1/2019</td>
<td>Last day to submit for payroll transfers to HRS.</td>
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<tr>
<td>8/8/2019*</td>
<td>Last day for VP areas to submit budget transfers - State (State Purpose Fund 10).</td>
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<td>Last day for VP areas to submit journal transfers - State (State Purpose Fund 10).</td>
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<tr>
<td></td>
<td>Last day for VP areas other than Acctg to process journal transfers &amp; budget transfers - State (State Purpose Fund 10).</td>
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<td>Your department's internal cutoff date will be earlier than 8/8/19. Check with your VP coordinator.</td>
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<tr>
<td>8/9/2019</td>
<td>Last day to request an increase to contract encumbrances (AC340 transactions).</td>
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<tr>
<td>8/23/2019</td>
<td>Last day for Contract payments.</td>
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<tr>
<td>8/30/2019</td>
<td>Last day for cancellation of encumbrances by SBU.</td>
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<td></td>
<td>Last day for all lapsed Procurement activity.</td>
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<tr>
<td>9/2/2019</td>
<td>Cancellation of all remaining encumbrances by SUNY.</td>
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<tr>
<td>9/13/2019*</td>
<td>Last day for VP areas to submit budget transfers - all Funds other than State.</td>
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<tr>
<td></td>
<td>Last day for VP areas to submit journal transfers - all Funds other than State.</td>
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RF guidelines when engaging Lecturers/Consultants/Independent Contractors

The Independent Contractor/Honorarium payment form used for lecturers, consultants and independent contractors who are being paid for a service or honorarium must be approved and signed by RF Payroll/HRS before payment can be processed in RF Payables, Procurement office.

RF Payroll/HRS approval is not required when lecturers, consultants or independent contractors are only receiving reimbursement for travel and travel related expenses or if the service are performed outside of the United States.

Any travel reimbursements paid to lecturers, consultants or independent contractors must have all original receipts accompanying the Independent Contractor form. Per diems cannot be claimed for meals, the IRS requires original receipts.

If the consultant’s fee is $10,000.00 or more, a contract must be signed through the Procurement Office.

If the consultant will be paid multiple payments; for example weekly or monthly installments, a Purchase order will be processed to encumber the funds to process payments from.

Payments to lecturers, consultants and independent contractors who are non-resident aliens must be submitted with the required tax forms and documentation. Lecturers, consultants and independent contractors who have a status of Permanent US Resident, should provide a copy of the alien resident card.

Research Foundation employees employed by another campus cannot be paid from the Independent Contractor/Honorarium payment form. Research Foundation employees who give a Research Foundation-sponsored lecture will be compensated through the Research Foundation's payroll process.

**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

**Travel Pre-Approval:**

All travel expenditures greater than $500 must be pre-approved by the respective Vice President
using the Travel Pre-Approval form. **Travel arrangements should not be made until such**
**approval is obtained.**
This pre-approval process is required when using the following funds:
- State Purpose
- General IFR
- SUTRA
- RF Indirect Cost Recovery (IDC)

You must include a copy of the approved form when submitting your Travel Reimbursement
voucher. Reimbursement will not be processed unless this form is signed and attached to your
Travel Voucher.

The Travel Pre-Approval form can be found on the Procurement website under Forms &
Publications.
https://www.asa.stonybrook.edu/asa/ASAFORMS/Department/PROC/Document/PROC0005

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

**When a vehicle is required for travel trips over 100 miles and there are no State vehicles**
available, employees are to determine the most economical method of transportation; a
**rental vehicle or a POV.** When using your personal car for business, you will be reimbursed at
the IRS business mileage rate. 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.

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.

Mileage will be reimbursed in accordance with the current standard IRS mileage rate at the time
of travel. **Travelers on State funds are required to document their mileage using the AC-160 form.**

Effective January 1, 2019 the current standard IRS mileage reimbursement rate is $0.58 per mile.
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.

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 CitiManager 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)
  o 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).

• 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