Annual Procurement Training

The Procurement Office provided its annual campus training the weeks of December 10th and 17th, 2018. The training topics included State and Research Purchasing, State Contracts, State and Research Accounts Payable, State and Research Travel, State Procurement Cards, Mail, Central Receiving and Property Control processes and policies.

All training presentations will be made available on our website. [http://www.stonybrook.edu/procurement/employees/trainingPresentations.shtml](http://www.stonybrook.edu/procurement/employees/trainingPresentations.shtml)

We would be happy to customize training if anyone is interested. Please reach out to the following contacts:

- Mike Standridge at 2-6046 for State and RF commodity and service purchasing, including campus catering and contractor evaluation.
- Christine Wilson at 2-6433 for State and RF Accounts Payable and Travel and State Procurement Card
- Cyril Rickson at 2-6305 for Central Receiving and Property Control
- Louise Melious at 2-6348 for Mail Services

We appreciate the attendees for taking time from their busy schedules to participate in the Procurement training seminars. We hope everyone came away from the sessions with a better understanding of the Procurement processes.

WolfMart Training

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

New, in Person, Training Classes for beginners and advanced users are scheduled for this Winter 2019. Training will take place at the Procurement Office which is located at Research & Development Park, RSS Building Room 107. To register for the training class, please click the following link: [http://www.stonybrook.edu/wolfmart/training/index.php](http://www.stonybrook.edu/wolfmart/training/index.php)

Any questions please feel free to contact Margaret Uyeno or Fran Gandia at 2-4573 or email us at _Wolfmart_Help@stonybrook.edu_
**WolfMart Reminders**

**WolfMart Ship-To Locations**
Please remember to update your Building and/or Room Number if you have relocated or moved offices. It is important for Central Receiving and Mail Services, as well as our vendors that offer desktop delivery to the campus community. For assistance, please view the training site: [https://www.stonybrook.edu/wolfmart/training/getting-started/setting-your-default-shipping-address](https://www.stonybrook.edu/wolfmart/training/getting-started/setting-your-default-shipping-address)

**Vendors in WolfMart**
If you wish to add a vendor in WolfMart please make sure the vendor will accept a purchase order from the University. If the vendor will not accept a purchase order, then please contact Gerardina Paduano, P-Card Administrator about using your State P-card instead.

**Requirement for Approval of WolfMart Requisitions for Equipment over $5,000**
Please note that all requisitions for equipment exceeding $5,000 requires VP approval. Specific approvers have been identified for each area. Please include written approval either via a WolfMart comment or by attaching a document to the requisition. This will ensure your requisitions are processed in a timely manner.

**Campus Shredding Vendor**
Please be advised that in accordance with NYS Preferred Source law, we have changed our campus shredding vendor from Quality Shredding to NYSID (New York State Industries for the Disabled, Inc.). NYSID will be working with Stony Brook University to provide on-site secure document destruction. We have entered into a 1 year agreement which provides us with the best possible pricing. For any questions, please contact Fran Gandia at 2-9094 or email: fran.gandia@stonybrook.edu

**All Catering Orders Require a Purchase Order in Advance**
All departments must submit a non-catalog form in WolfMart to request catering that is delivered to campus and a Service Request form for off campus catered events (including Hilton Garden Inn) at least 1 week before the event. **Placing a verbal order or otherwise committing to purchasing catered food without a purchase order is a violation notice of Procurement Policy.** Obtaining a purchase order in advance ensures that the vendor will be paid for the catering order.

If a vendor contacts you about the status of a payment, and you have a valid Purchase Order number you may refer them to the appropriate individual as identified below:

**State** PO’s have 6 numeric digits and contain either a suffix of S or B
Contact: Mary Martines at 2-6012  mary.martines@stonybrook.edu

**Research** PO’s have 7 numeric digits
Contact: Bill LaCascia, at 2-6001 william.lacascia@stonybrook.edu
Please remember: catered events require a PO number in place before the food is delivered. If you need help with on campus orders call Michele Rindos at 2-6071 for State orders or Teri Sentowski at 2-6056 for RF orders. Call Fran Gandia at 2-9094 for off-campus orders.

Important steps to follow:
1. Plan the event in advance. Review the meal rates per person (Breakfast $14, Lunch $25, Dinner $27.) Obtain a written quote from the vendor.
2. Prepare a non-catalog requisition in WolfMart for all catering orders delivered to the campus. Prepare a Service Request form in WolfMart for catered events held off campus.
3. Attach documents to support these 3 questions:
   a. Who? List of attendees/invitees
   b. What? Quote from vendor
   c. Why? Justification/description of event
4. Make sure PO is issued by Procurement. If date of event is close and you have not seen a PO, call the buyer listed on the requisition.

Dos and Don’ts

Do make sure a PO was issued before the event
Do use a sign in sheet to confirm attendees
Do read the SBU Policy
http://www.stonybrook.edu/procurement/employees/purchasing/state_procurement.shtml#food

Do not pay NYS sales tax, provide vendor with a tax exempt certificate
Do not order alcoholic beverages
Do not put the requisition on after the event; make sure it’s BEFORE the event

Exception: You may submit Who/What/Why documents on a non-encumbered payment form AFTER the event only if dining out and the restaurant will allow direct billing. Note: The tip has to be within the cost of the meal limit.

Accounts Payable Reminders

Vendor Invoices Received Directly in Departments

Campus departments are advised that the Procurement Office is the designated payment office and must receive original invoices directly from the vendors. Do not instruct vendors to mail invoices directly to your department. If a vendor does submit an original invoice to your department, you must send the invoice along with your invoice payment approval written on it to the Procurement Office via campus mail, Z=6000. Please do not submit vendor invoices via email, fax, or as an attachment to the WolfMart requisition, purchase order or voucher. Your approval for payment of an invoice must include:

- “OK to Pay” written on the invoice
- The date the goods were received/service completed
- Original authorized signature (no signature stamps or initials)
What Is a Valid Vendor Invoice?

A proper invoice - mailed to the Procurement Office by the vendor - **must** contain the following information:

- Vendor name
- Bill to information: Stony Brook University and address
- Purchase Order/Contract number
- Description of goods or services provided
- Quantity and price of goods or services delivered or rendered
- Total Amount requested

Adding Comments to a WolfMart Order

When corresponding to the Procurement Office via the comments feature in WolfMart, end-users must remember to **always select an email recipient**. Otherwise, the comment may not be acted upon in a timely fashion. When adding a comment to a WolfMart order, please ensure that you add your comment to appropriate document (i.e. requisition, purchase order, or voucher) by selecting the appropriate document from the drop down menu to the right of, “Show Comments For.”

The three choices are:

- Requisition
- Purchase Order
- Voucher
  - When adding a comment to a voucher, please ensure that your comment is added to the appropriate payment voucher. Please make sure a representative from AP is selected as an email recipient.
  - If you are responding to a request for invoice payment approval, please add your comment to the specific payment voucher tied to the invoice that you are approving for payment.

Prompt Invoice Payment Approval

Departments are reminded that they must respond to requests from the Procurement Office for invoice payment approval within 3 to 5 business days. Your department’s delay in responding may result in interest charges being assessed to your department’s account.
Travel Reminders

Travel Pre-Approval

In accordance with President Stanley’s 2018 Budget message, all travel expenditures greater than $500 must be pre-approved by the respective Vice President using the new 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 approved prior to travel arrangements. The Travel Pre-Approval form can be found on the Procurement website under Forms & Publications. [https://www.stonybrook.edu/procurement/](https://www.stonybrook.edu/procurement/)

When is it Appropriate to use a Personal Vehicle for Travel?

When traveling on behalf of Stony Brook University, travel should be by the most efficient and cost-effective method of transportation available in the best interest of the State. Employees must perform a cost comparison between renting a car and driving their own vehicle. Supervisors should review travelers’ itineraries in advance to ensure that the most economical method of travel is used. When supported by proper justification, personal vehicles may be used when rental vehicle transportation is not available or cost effective. The justification, submitted with supervisor approval, must clearly state why the use of the personal vehicle was the most cost effective option. Employees who choose to use their personal vehicle solely based on personal preference will be reimbursed at the lesser of the two costs. Mileage will be reimbursed in accordance with the current standard IRS mileage rate at the time of travel. The Office of General Services (OGS) has Rental Vehicle agreements with both Enterprise and Hertz. To assist travelers in determining whether a rental car or personal car is the most cost effective method of transportation, “Trip Calculators” can be located at: [https://www.ogs.ny.gov/bu/ss/trav/calculators.asp](https://www.ogs.ny.gov/bu/ss/trav/calculators.asp)

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

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.
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.

Conference Travel
When your travel purpose is to attend a Conference, you must attach a copy of the conference brochure/daily agenda to your Travel Voucher. Please note that per diem for meals cannot be claimed when meals are provided by the conference.
**Overnight Receipted Travel (Method 2)**

Provides reimbursement of actual lodging costs and a per diem allowance for meals and incidental expenses, based on federal reimbursement rates for the county of lodging. All requests for reimbursements of lodging that exceed the maximum per diem cost must include a justification signed by the traveler’s supervisor/account manager. Receipts are required for lodging, no receipts are required for meals. For Domestic Travel, use the GSA site [https://www.gsa.gov/travel/plan-book/per-diem-rates](https://www.gsa.gov/travel/plan-book/per-diem-rates) to obtain the total meal per diem for the day, then go to the following link to calculate the meal breakdown for breakfast and dinner rates. [https://www.osc.state.ny.us/agencies/guide/MyWebHelp/Content/XIII/4/D.htm](https://www.osc.state.ny.us/agencies/guide/MyWebHelp/Content/XIII/4/D.htm)

**ITA/NET State Travel Accounts**

It is the responsibility of the supervisor to notify the Travel Office immediately when a traveler who has an ITA or NET Travel Account leaves the University or transfers departments so the account can be cancelled and closed.

**Motor Vehicle Infractions**

As per State and RF policies, whether an employee is in travel status or on official business, and using either a University owned vehicle or personal vehicle, any and all motor vehicle infractions incurred (including but not limited to speeding fines, red light camera tickets, parking tickets, etc.) are the responsibility of the driver of the vehicle, not the institution or department within. All requests for direct payment or reimbursement will be rejected.

**New York State Citibank Procurement Card**

**Important Updates & Reminders:**

- The P-Card Cardholder/Supervisor Guidelines were updated July 2018; if you have not already done so, please review them and contact Gerardina Paduano with any questions/concerns
- 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 will 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.
- After your certification is complete, you are asked to interoffice the following by the designated due dates:
- Your original signed Statement Information Form
- Your Citibank Cardholder Statement (found on the CitiManager website)
- All corresponding original receipts (referencing the vendor name, item(s) purchased, and cost)
- A business purpose for each transaction (the Monthly Summary Log was created to assist you in doing so)
- Justifications and/or supporting documents (event sheets, lists of attendees, freight bills, certified payroll, etc. if applicable)

- Please be advised that if, after 3 occurrences, the following requirements are not met by the assigned monthly deadlines, your Procurement Card will be suspended:
  1. Certification of your monthly p-card statement on-line
  2. Submission of your Citibank Cardholder Statement signed by your Supervisor with all attached supporting documentation including justifications to the Procurement office

- Main Campus Information and Communication Technology purchases that exceed $2500 and are for student use must be vetted by DoIT before purchasing. Cardholders are required to attach DoIT’s written approval to the invoice.

- P-Card payments for advertising (including all social media campaigns) must have prior approval from the Office of Communications. Please use the following link and be sure to submit your written approval with your receipt(s) when the charge(s) appear on your statement:
  http://www.stonybrook.edu/brand/request-assistance/

- Promotional items may be ordered without prior approval. However, you must use a licensed vendor and follow Stony Brook University's licensing policy:
  stonybrook.edu/brand/design-visual-identity/merchandising-licensing/

- Equipment purchases made with the Visa Procurement Card fall under Campus/SUNY/NYS Property Control guidelines which require that you obtain decals for the following:
  - any computer, monitor, printer, and/or television purchase ≥$500
  - all other equipment and furniture purchases ≥$1500

- DO NOT use your Procurement Card for:
  - Catering expenses
  - Food/beverages/paper or plastic goods for general office use (candy, snacks, water bottles, etc.)
  - Over-the-counter medication (including but not limited to Tylenol, Advil, Motrin, etc.)
  - ANY travel/lodging/entertainment
  - The purchase of Amazon Prime Memberships
  - Payments to Independent Contractors (anyone doing business with an SSN)
• Cardholders who have joined the program after February 7, 2016 will use the last 4 digits of their SUNY ID (found in “Your Settings” on the Cardholder Statement page of the certification system) for verification when calling Citibank. All other Cardholders will continue to use the last 4 digits of their SSN as verification.

• Report lost or stolen cards to Citibank and your Procurement Card Administrator immediately

• 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 at:
https://www.stonybrook.edu/procurement/employees/credit_card_programs.shtml
Should you have any questions please feel free to contact Gerardina Paduano, Procurement Card Administrator at 2-6017.

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