

**STONY BROOK FOUNDATION CALENDAR REMINDERS**

**FY 2026 Dates - for all SBF Funds**

<u>Date</u>	<u>Item</u>
<b>Orders for goods and services charged to the 2025/26 fiscal year must be received no later than June 30, 2026. Goods received and services completed after 6/30/2026 will be paid with 26/27 funds.</b>	
<b>5/8/2026</b>	All Commencement Award Payments and required documentation should be submitted in <a href="#">Avid</a> by this date. *Avid transactions not approved by 5/22 will not be processed, and must be resubmitted by the user in July 2026 *This will allow for payments to be processed and issued by Tuesday, 6/30/26 *Reminder: The process of setting up a recipient as a vendor and processing the payment takes approximately 10-21 business days
<i>Link -&gt;</i>	<a href="#">Avid</a>
<b>5/8/2026</b>	Submit new vendor requests in Team Dynamix (TDX) and attach the appropriate IRS form ( <a href="#">W-9</a> or <a href="#">W-8Ben</a> ), no later than this date <u>for all new payment recipients</u> *Reminder: It's essential to note that the IRS Form W-9 is for U.S. or resident alien students, while the IRS Form W-8BEN is for nonresident alien students. According to IRS regulations, award payments made to nonresident aliens may be subject to up to a 30% withholding tax
<i>Link -&gt;</i>	<a href="#">W-9</a>
<i>Link -&gt;</i>	<a href="#">W-8</a>
<i>Link -&gt;</i>	<a href="#">Team Dynamix</a>
<b>5/8/2026</b>	Commencement receptions require a SBF Purchase Order. *Please email the <a href="#">Purchase Requisition form</a> along with a business justification, event invitation, list of attendees with relationship and quotation to <a href="mailto:SBF_PO@stonybrookfoundation.org">SBF_PO@stonybrookfoundation.org</a> by this date
<i>Link -&gt;</i>	<a href="#">Purchase Requisition Form</a>
<i>Email Link -&gt;</i>	<a href="mailto:SBF_PO@stonybrookfoundation.org">SBF_PO@stonybrookfoundation.org</a>
<b>5/30/2026</b>	Last day to submit requests to open a Purchase Orders for the current fiscal year (FY25/26)
<b>6/12/2026</b>	Last Day to submit ALL invoices against existing Purchase Orders
<b>6/12/2026</b>	Last day to submit your <a href="#">Concur</a> Travel reimbursable expenses, which must be reviewed and approved by your Supervisor, for processing *All Travel expenses must be approved by directors or signatories no later than 6/19/2026 *All Travel expenses must be accrued by 6/30/2026 in order to be paid with 25/26 funds
<i>Link -&gt;</i>	<a href="#">Concur</a>
<b>6/30/2026</b>	<b>*NEW PROCEDURE*: ALL open Purchase Orders will be disengaged by this date. Departments will receive an email identifying existing purchase orders with instructions to review and identify those PO's to be re-opened for the FY26/27 fiscal year. All requests should be sent to <a href="mailto:SBF_PO@stonybrookfoundation.org">SBF_PO@stonybrookfoundation.org</a></b>
<b>6/30/2026</b>	All goods and services against Purchase Orders must be received or completed by this date in order to be paid with 25/26 funds. Goods received, and services completed after this date, will be paid with 26/27 funds
<b>6/30/2026</b>	Last Day of the fiscal year
<b>Please Note</b>	
<b>REIMBURSEMENTS</b>	<b>Relocation Expenses:</b> SBF does not reimburse relocation expenses to employees. These costs must be submitted and processed through Payroll. <b>Employee Equipment Purchases:</b> SBF does not reimburse employees for equipment purchased with personal funds. All equipment must be procured through SBF using an approved purchase order by submitting a request to <a href="mailto:SBF_PO@stonybrookfoundation.org">SBF_PO@stonybrookfoundation.org</a> . <b>Human Subjects / Animal Services:</b> SBF does not process payments for services performed on human subjects or animals. These invoices must be submitted on a purchase order by submitting a request to <a href="mailto:SBF_PO@stonybrookfoundation.org">SBF_PO@stonybrookfoundation.org</a> .
<b>Summer / Winter Session FY26/27</b>	<b>Stipend forms should be submitted through the <a href="#">Avid portal</a></b> *Please note that Stipends are designated for services performed during the summer and/or winter sessions
<i>Link -&gt;</i>	<a href="#">Avid</a>
<b>Scholarships FY 26/27</b>	Please submit a requisition form along with all required documentation to Financial Aid at the following email address: <a href="mailto:Daniella.Steuer@stonybrook.edu">Daniella.Steuer@stonybrook.edu</a> , and cc: <a href="mailto:nicholas.prewett@stonybrook.edu">nicholas.prewett@stonybrook.edu</a> *Please note that the requisition should note that all students meet the criteria
<b>Payments FY 26/27</b>	<b>Stony Brook Foundation (SBF) no longer has check printing capabilities</b> **Payees will receive an email from J.P. Morgan Concourse with the subject: "You Have Received a Payment from Stony Brook Foundation, Inc." The email will have the payment details with a link to register and accept payment ** Registration is required upon first use only **Payees with a U.S. bank account, can register using either their SBU school or personal email address **Payees with bank accounts outside the U.S., can opt to be paid by wire transfer, or JP Morgan Concourse can mail a check to their local U.S address. <b>Important:</b> If the payee elects not to register for ACH or ignores their e-mail notification, the payment will be sent via check 7 days after the email is sent by JPMorgan Chase Concourse

\*There are **NO** exceptions on cut-off dates.