

Quick Tips:

- **Bookmark the link to this guide and do not download it. We will continually update the list.**
- Refer to the [Requisitioning policies for purchasing goods and services](#) located in PeopleSoft at <https://www.case.edu/compliance/8.3.2> (U.S. Department of Justice, Office of Inspector General, 2017).
 - **Payment Request** - a request to purchase goods, services, etc. routed in PeoplesSoft. Payment Requests are not reimbursements to employees. Reimbursements to employees are governed by the Travel and Expense policy. Please refer to the Travel and Expense policy before making purchases with personal funds.
 - **SmartCART** - the platform in PeopleSoft to allow the requisitioners to request to purchase goods, services, from a supplier's website or using a supplier fix pricelist.
 - **Procurement Card Types:**
 - **PCard** - A Procurement Card used for small- dollar goods and services, issued to an individual.
 - **DCard** - A Procurement Card used for food and beverage needs (under \$500), issued to a department custodian.
 - **T&E Card** - A travel and entertainment card, administered by the Travel office. Please email travel@case.edu for more information.
 - **Wex Fuel Card** - The fuel card assigned to a CWRU

How to Buy Matrix:

This matrix meant to be a purchasing guide for how to buy the most popular categories of spend and is not an all-inclusive list. A blank space in the matrix means the payment method is not permitted for the specified expense category. If a unique situation arises and you would like an exemption review, contact pcard@case.edu if using a PCard or contact Procurement at 216-368-2560 or email us at customercareteam-pds@case.edu.

Expense Category	Payment Method			
	Procurement Card	SmartCART	Requisition	Payment Request
After-the-fact (AFT) invoice payments. AFT invoices should be avoided as they are against procurement policy. AFT payment terms may be adjusted to net 120.			Yes	
Alcohol, travel & entertainment related		T&E Card		

Expense Category	Payment Method			
	Procurement Card	SmartCART	Requisition	Payment Request
Food/Beverage over \$500			Yes	
Food/Beverage under \$500, brought back to campus	DCard	Yes	Yes	Yes
Food/Beverage under \$500, travel & entertainment.	T&E Card			
Disposable plates, cups, napkins, and other food/beverage related supplies	PCard or DCard			
Food Trucks			Yes	
Furniture		Yes	Yes	
Gas cylinders		Yes	Yes	
Gasoline - related to T&E	T&E Card			Yes
Gasoline - for CWRU fleet vehicle	Wex Fuel Card			Yes
Gift cards/Gift certificates		Yes	Yes	
Gifts & Awards over \$75 Gifts & Awards, Individuals and Personal Life Events	May not be permitted. Refer to the gift related policies			

Quick Summary of Bidding Rules, Forms, & Exemptions

This is a quick summary of the PDS Procurement Policy and not considered an all inclusive list of information. Refer the full policy for more information. ([click here](#))

Purchases with an aggregate value <\$10,000 require one quote. Purchases with an aggregate value \$10,000 - \$50,000 require two quotes. Purchases with an aggregate value >\$50,000 require three quotes. Purchases with an aggregate value over \$10,000 that are not bid, do require the use of a Single /Sole Source Justification (SSJ) form ([click here](#)) to express cost reasonableness and why bidding was not performed. Users are responsible for obtaining these bids, and should ensure the bids are based on a clear and accurate description of the technical requirements for the material, product or service to be procured. Such a description should not contain features that unnecessarily restrict competition. Some purchases require a Professional Services Bid Exemption form ([click here](#)) in lieu of the SSJ Form (refer to the tables below).

Bidding & SSJ Exemptions Tables

Aggregate purchase amount:	\$10,000,- \$50,000	Over \$50,000
Advertisements	These categories do not require a SSJ or multiple bids attached to the requisition as these categories are (1) controlled by a bid process within the UGEN departments (example: Construction and preferred vendors), (2) the nature of the spend is unbiddable (example, US Mail), or (3) the category is controlled by other approval processes (example . Attaching the quote is required. Attaching cost reasonableness is highly encouraged.	
Affiliates		
Autopsies/Funerals		
Construction		
Employee Benefits Vendors		
Government Imposed Fees/Fines/Taxes		
Honorarium (Gifts)		
Insurance Premiums		
Memberships & Dues		
Postage (Us Mail Only)		

Preferred Vendors: Legacy Staffing, Kelly Services, SmartCART



Contacts:

A full list of department members can be found on our website. When possible, we encourage you to use our shared email boxes and central phone number to ensure the fastest turnaround time on your inquiry.

<https://case.edu/procurement/about-us/staff-directory>

Procurement & Distribution Services Customer Service

- Vendor setups/changes, tax exemptions, first point of contact in PDS if you aren't sure where to start
- TIP BDC /1nTw A (P C(s/ 3 (o)13 0 Td(f Tf-4.8 (a)1.46.3 (t i)9 0 Td(f (e)8.3 (c6 Tw 1o.i)9 0 Td(f (v9a)12.3 (rT)se)-2.6 (th)1

Links found in this document:

Forms (Bid Exemption Form, Honorarium Form, Single/Sole Source Justification Form)

<https://case.edu/procurement/purchasing/forms>

These items below can be found at this link: <https://case.edu/procurement/purchasing/policies-and-training-resources>

- Procurement & Distribution Services How to Buy Guide
- How to Buy Software & Subscriptions
- Procurement Policies
- Procurement Training:

Delegated Signatory List: <https://case.edu/generalcounsel/faqs>

Staff Directory: <https://case.edu/procurement/about-us/staff-directory>
