

Procurement & Distribution Services How to Buy Guide

In this How to Buy Guide:

- Quick Tips
- Payment Method Definitions
- How to Buy Matrix—provides insights on which payments methods can be used for different types of purchases
- Quick Summary of Bidding Rules, Forms, & Exemptions
- Payment Terms
- Contacts
- Important Links

Quick Tips

- **Bookmark the link to this guide and do not download it. We will continually update the list.**
- Refer

contracts@case.edu or the Office of General Counsel at generalcounsel@case.edu

- If you are a Pcardholder, purchases made on our central Amazon Business account (email pcard@case.edu to ensure you are using the correct account), will go through an approval workflow prior to the order being shipped. This approval workflow on the account will act as the exemption for purchases made on Amazon Business if in conflict with this How to Buy matrix.
- How to Purchase Software and Subscriptions training guide for more information <https://go.case.edu/cas/cas>, etc from a supplier's website or using a supplier price list.
- Procurement Card Types:
 - o PCard - A Procurement Card used for small- dollar goods and services, issued to an individual.
 - o DCard - A Procurement Card used for food and beverage needs (under \$500), issued to a department custodian.
 - o T&E Card - A travel and entertainment card, administered by the Travel office. Please email travel@case.edu for more information.
 - o Wex Fuel Card - The fuel card assigned to a CWRU fleet vehicle (excludes shuttle buses).
 - o Enterprise Maintenance Card - The maintenance card assigned to a CWRU fleet vehicle (excludes shuttle buses).
 - o CDEP Cards - Agency fund cards. CDEP cards are not addressed in this matrix. Contact Student Affairs for more information on CDEP Cards.

Procurement & Distribution Services How to Buy Guide

Procurement & Distribution Services How to Buy Guide

Furniture

Yes

Yes

Procurement & Distribution Services How to Buy Guide

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 to the 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 Sole Source Justification (SSJ) form [\(click here\)](#) to express cost reasonableness and why bidding was not performed. 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		
Affiliates	These categories do not require a SSJ or bids attached to the requisition as these categories are controlled by a bid process by specific UGEN departments as part of the Prefer Supplier Program or by the nature of the spend is unbiddable. Attaching cost reasonableness is always in encouraged.	
Autopsies/Funerals		
Construction		
Employee Benefits Vendors		
Government Imposed Fees/Fines/Taxes		
Honorarium (Gifts)		
Memberships & Dues		

Procurement & Distribution Services How to Buy Guide

Payment Terms:

- Net 45 -Standard
- Net 30 -Vendors accepting AMEX Vpay or AMEX BIP
- Net 10 -Certified small and diverse business
- Net 120 -When work or an order is verbally authorized

Procurement & Distribution Services How to Buy Guide

Contacts:

A full list of department members can be found on our website. When possible, we encourage you to use our shared e-mailboxes and central phone numbers 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 go
- TIP—please include the vendor number, requisition, or purchase order number in your inquiries
- 216.368.2560
- customer-care-team-pds@case.edu

Accounts Payable

- acctpay@case.edu—payment inquiries only, no invoices are accepted at this email
- invoicespds@case.edu—invoices only

SmartCART

- Contact for changes in shipping addresses or help with SmartCART or purchasing systems
- smartcart@case.edu
- poclose@case.edu—use this email to close PO's and requisitions

Procurement Cards

- Procurement card needs, setup payment methods, access to central Amazon Business account
- TIP—include the cardholder name in your inquiry
- Pcard@case.edu

Procurement

- Requisition status, procurement policies and procedures, supplier selection, RFP, negotiations,
- TIP—include the purchase order number or requisition number in your inquiry
- Contact customer-care-team-pds@case.edu or contact the buyer listed in the approval steps on the requisition

Procurement Contracts

- Contract review and signature, negotiation, contract status.
- Contracts@case.edu

University Movers

- Email Movers@case.edu with the details related to your moving needs including date(s), contact person, the contact person's phone number, address(s) related to the move, the department's speedtype, and a description of your moving needs.

Mailroom & Dock

- 216-368-2565
- mailroom@case.edu

Procurement & Distribution Services How to Buy Guide

Links found in this document:

Forms Bid Exemption Form, Honarium 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](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>

Procurement & Distribution Services How to Buy Guide

Revision History

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- Moved from the header to the first page.