

Procurement & Distribution Services  
March 2025

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*Please forward this newsletter internally to purchasing stakeholders as appropriate.*

#### **Updated - Supplier Information Form (SIF)**

The updated SIF includes instructions for suppliers regarding required fields and updated language throughout the form. The old SIF will no longer be accepted after April 15, 2025. Please plan accordingly, as processing a vendor setup can take up to 3 business days. The new form is now available at <https://case.edu/procurement/purchasing/forms>.

#### **Updated - Certification of Invoice for Payment Form for Subaward Payments**

The Procurement Office and the Sponsored Projects Financial Compliance Office have collaborated to update the **Certification of Invoice for Payment** form ([ORTM Forms & Policies](#)) for Subaward payments. The new form was rolled out on **February 15** with key improvements to streamline the process. It was announced in the RADAR newsletter. Incomplete forms will be returned to the department, and the invoice will not be processed. Key Updates:

- **Simplified Approval:** Only one signature from the Principal Investigator (PI) is now required.
- **Risk Verification:** A new section has been added to assess the subrecipient's risk level, including a link to the High-Risk Subrecipients list.
- **Additional Documentation Requirement:** If a subrecipient is listed as high risk, you must include their income and expense statement as proof that the invoiced expenses have been recorded in their ledger. If this has not been received, it must be requested and obtained before processing payment.

As a reminder, the invoice, required backup, and the Certification of Invoice for Payment form must be merged into a single PDF before submitting it to [invoices-pds@case.edu](mailto:invoices-pds@case.edu). For any questions regarding high-risk subrecipients, please contact Joel Morales at [jcm215@case.edu](mailto:jcm215@case.edu).

#### **Large Purchase Form & Process**

An updated large purchase (purchases over \$250,000) form and procedure is underway. In the meantime, if you need to make purchases over \$250,000, contact Ashley Frantz, Chief Procurement Officer, [AXF335@case.edu](mailto:AXF335@case.edu) for support. Updates will be released in the April newsletter.

#### **New Coffee Vendor Added**

We recently exited Aramark Refreshment Services. We have welcomed [Garden Food Services DBA 3rd Coast Coffee](#) as a replacement for Aramark Refreshment Services. We also continue to partner with [Atlas Management Corporation DBA American Coffee](#). To learn more about these coffee programs, please contact Mary Luberger or Laurie McCulloh. These vendors offer free or low-cost beverage machines, supplies, and weekly on-campus delivery.

#### **AMEX BIP & VPay Campaign**

Case Western Reserve University's preferred payment method is **AMEX**. We offer two AMEX payment methods: Buyer Initiated Payment (BIP) and Virtual Credit Card (VPAY). The BIP program is similar to ACH payments; however, payments are initiated and facilitated by AMEX, which will maintain all banking information. The second payment method is VPAY, which is a virtual credit card.

Under our agreement terms with AMEX, the supplier will receive net 30-day payment terms and access to a client portal for navigating electronic payments. AMEX enrollment can be completed quickly and easily. If you have a vendor interested in receiving more information, please have them contact [CustomerCareTeam@case.edu](mailto:CustomerCareTeam@case.edu) to receive an invitation to the program.

Recently, we launched a campaign with AMEX to explain the benefits of enrollment. If you or your supplier have any questions about calls or emails received from AMEX, feel free to reach out to:

- **Christine Johnson**, Director, Procurement - Operations: [CXJ333@case.edu](mailto:CXJ333@case.edu)
- **Ashley Frantz**, Chief Procurement Officer: [AXF335@case.edu](mailto:AXF335@case.edu)

#### **New SmartCART Supplier(s)**

- **Genesee Scientific**: A leading supplier of products to global life science research markets.
- **GenScript**: A leading biology research service company offering comprehensive life sciences research services and products.
- Coming soon -
  - BioLegend - Provider of antibodies, reagents, cell dyes, buffers, panels, kits & more.
  - Club Colors - CWRU branded apparel

#### **Purchasing Tax Free Ethanol & Specialty Regulated Chemicals**

To purchase tax-free ethanol alcohol, the university requires the maintenance of a detailed inventory and mandates training for all end-users on the specific requirements for possession. You must read and sign a brief training document to be added to an approved list along with your lab location. Each time you place an order, you will need to update your current inventory along with the requisition. Training can be found here [LINK](#).

Methylene chloride and several other chemicals are now restricted to research institutions due to recent regulations. To possess or order these materials, your lab must develop a safety plan and undergo air monitoring. For further details or to initiate this process, please contact Environmental Health and Safety (EHS) or visit the [Methylene Chloride page](#) at Case Western Reserve University EHS.

**How to Solve the "This may change the Default values for the Line #..." pop-up message:**

When a Requisitioner places an order in SmartCART and imports the order into PeopleSoft Financial as a requisition, they may encounter the following pop-up message: "This may change the Default values for the Line #. Do you want to update the Line defaults (10150,180)? Changing the items, category, and supplier will change the Line Default values. Retrofit the default values from the default hierarchy."

- To **clear this message**, the Requisitioner may select the option "No."
- To **prevent this message** from occurring in the future, the Requisitioner should [Click Here](#) for instructions. The total fix time is under one minute

### 1099 Forms

Supplier 1099s were mailed in January. If your supplier has not received their 1099 form, please have them email [1099@case.edu](mailto:1099@case.edu).

### Visit from Procurement & Distribution Services

Procurement & Distribution Services is scheduling departmental visits around campus throughout 2025. These visits aim to build relationships with users, provide an overview of each PDS team, and answer questions. We also offer department refresher training tailored to your school's or department's needs. To invite PDS to visit, contact Ashley Frantz, Chief Procurement Officer, [AXF335@case.edu](mailto:AXF335@case.edu), 216-368-2595.

### Lost Amazon Business Packages

Although shopping on marketplaces is discouraged compared to using preferred vendors on SmartCart, we acknowledge Amazon Business's importance in fulfilling supply chain needs. If you are experiencing issues with lost Amazon Business packages, here are two tips:

1. **Report immediately** to Amazon Business customer service. Our Amazon Business client solutions team reviews these reports and provides additional training to drivers as needed.
2. **Use the Cedar Avenue Services Center mailroom.** You can arrange to pick up your package promptly or hire the Movers team for delivery by emailing [Movers@case.edu](mailto:Movers@case.edu). For more information, contact [mailroom@case.edu](mailto:mailroom@case.edu).

### General Reminders

- **Incomplete forms** may cause delays or rejections in supplier setup, requesting processing, and invoice processing. If using an applicable form as part of the workflow, please ensure it is filled out completely and correctly. Forms can be found here: <https://case.edu/procurement/purchasing/forms>
- **Contracts** - Before routing contracts, verify requisition comments and ensure details like the vendor signatory's information and all contract pages are included. The updated list of persons authorized to sign CWRU contracts can be found here: <https://case.edu/generalcounsel/faqs>
- **Invoices** without the supplier's applicable PO number will not be paid through CWRU.
- **Sign up for this Newsletter** - if this newsletter was forwarded to you and you would like to receive future announcements from procurement, sign up here: <https://case.edu/procurement/about-us/newsletter>

Ashley Frantz  
Chief Procurement Officer

Case Western Reserve University  
Procurement and Distribution Services  
Cedar Avenue Service Center  
10620 Cedar Ave., RM 223  
Cleveland, Ohio 44106-4909  
216-368-2595  
[axf335@case.edu](mailto:axf335@case.edu)

Web: [case.edu/procurement/](http://case.edu/procurement/)

[customercareteam-pds@case.edu](mailto:customercareteam-pds@case.edu) - General procurement questions

[acctpay@case.edu](mailto:acctpay@case.edu) – Payment status and inquiries

[invoices-pds@case.edu](mailto:invoices-pds@case.edu) - Invoices only (do not send payment questions)

[smartcart@case.edu](mailto:smartcart@case.edu) - SmartCART inquiries