

# Welcome to the February 2026 Procurement and Distribution Services Newsletter!

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We're excited to bring you the latest updates, team introductions, and helpful resources to support your purchasing and business operations across campus. Read on to meet new faces, learn about policy updates, and discover how we can assist your department!

## **New roles and New faces:**

We are pleased to welcome **Alita Cauley** and **Ashish Goyal** to the PDS team. **Alita** joins us as our new Department Administrator and will serve as your primary contact for supplier onboarding, sales tax exemptions, and all Customer Care Team inquiries. **Ash** joins Michael Scalise as an ERP Systems Analyst; together, they will provide dedicated technical support for our procurement systems.

## **Independent Contractor Process Change – \*Please Read\***

Recently, Human Resources has implemented a new process to engage IC's to strengthen the university's compliance with IRS and Dept. of Labor Standards. Anyone wanting to contract an IC's services must follow the new procedures outlined on the HR webpage [Policies](#). A link to the HR site can also be found on the Procurement site on our [Policy Page](#).

Two major changes in this process are that HR is now determining the work classification; *Is the professional service requested an Independent Contractor or not?* **And**, requiring the department to verify the completion of the project before an invoice can be submitted. The form now required with invoice submission can be found on the HR IC link provided above, or on Procurement's website [Forms Page](#).

It is recommended that all departments, faculty and administration who hire IC's for services, including but not limited to consultants, guest speakers and presenters, begin with the HR process. [IC-hrapproval@case.edu](mailto:hrapproval@case.edu) is also a great place to start if you have any questions before submitting a requisition.

## **News and Other Important Updates....**

**Vendor Fair 2026** – Stay tuned to our [webpage](#) for the latest Vendor Fair updates. Registration will open shortly for all vendors, with further details to follow soon.

In the meantime, is there a specific vendor you'd love to see on October 20th? We'd value your input—please share your suggestions with us at [vendorfair@case.edu](mailto:vendorfair@case.edu)!

**Payment & Reimbursement Policy** – This policy has been updated for formatting and incorrect links. Please note – purchase of lottery tickets is not a reimbursable expense.

**Meals & Entertainment Policy** – This policy has been updated for formatting and incorrect links.

**Amazon** – All Amazon purchases should be made through the consolidated CWRU Amazon Business Prime Account. Purchases made using a PCard outside of the campus Business account are against PCard policy. Amazon purchases made out-of-pocket are **NOT REIMBURSABLE** and will be denied. The CWRU consolidated account includes Amazon Prime membership. No end users should be paying for a separate Amazon Prime membership for business use. Memberships are non-allowable expenses.

We are making other updates weekly. To ensure you always have the most up to date information, please bookmark links, do NOT save forms, policies or procedures.

## Reminders:

**Current SIF** – The most current SIF will show a review date of July 2025 in the upper left corner. Please be sure that any SIF submissions are completed using the current form, found [here](#). Customer Care Team will return any submissions that include an outdated version of the SIF. Please also be sure to remind potential suppliers that a signature, either wet or certified digital, is required in the Conflict of Interest section regardless of answer.

**Invoice submission** – All invoices should be submitted to [invoices-pds@case.edu](mailto:invoices-pds@case.edu) as one single invoice per email. PDF packets of more than one invoice should be separated and emailed individually.

**Campus Outreach - *Have you experienced staff turnover or maybe just want a personalized procurement refresher for your department?***

We'd love to visit and meet with you! Reach out to Beth Connelly at [bx571@case.edu](mailto:bx571@case.edu) or Nicole Karn at [nmk10@case.edu](mailto:nmk10@case.edu) to schedule a session.



## Procurement Tip of the Month!

### Category Clarification:

- We are discontinuing **Professional/Consulting Services** and keeping **Consulting and Professional Services**. Seems logical to pick one 😊.
- Also being discontinued is the category **Independent Contractor**. This is a Work Classification, not a procurement category and is causing additional confusion and we move forward with the new HR IC process.