

Welcome to the June 2026 Procurement and Distribution Services Newsletter!

Preparing for Fiscal Year 2027: Important Policy and Form Updates

As we prepare for the start of Fiscal Year 2027 on July 1st, Procurement and Distribution Services (PDS) is announcing significant updates to our bidding thresholds and procurement forms. These changes are driven by updated **Uniform Guidance** federal requirements to ensure our procurement processes remain compliant and transparent.

All updated forms and resources can be found on our website, beginning June 30th, 2026 at <https://case.edu/procurement/purchasing/forms>.

New Bid Requirement Thresholds (Effective 7/1/2026):

The university will be updating its bidding rules on July 1st for both federally funded and university-funded purchases:

- **\$14,999 and below:** Only a **single quote** is required.
- **\$15,000 – \$49,999:** Requires **two (2) quotes** or a Single/Sole Source Justification (SSJ). Note that for university-funded purchases in "bid-exempt" categories, competition is encouraged but not strictly required in this price range.
- **\$50,000 and above:** Requires **three (3) bids/quotes** or a completed SSJ. For university-funded professional services where bidding is not performed, a **Bid Exemption Form** is required.

Updated Procurement Forms:

Please ensure you are using the most current versions of these forms for all new requisitions:

- **Single/Sole Source Justification (SSJ) Form:** This form is required for any purchase over \$14,999 without a competitive quote. ***NOTE**, for all **federally funded purchases over \$14,999** that are not competitively bid, an SSJ must now be documented to comply with Uniform Guidance (2 CFR § 200.318-320).

- **Price Analysis and Reasonableness Form:** This form is required for all procurement actions at or above the **Simplified Acquisition Threshold (\$350,000)**. It requires the development of an **independent price estimate** *before* vendor bids are received. Because of the complexity of these purchases, we recommend scheduling a meeting with the Senior Director of Procurement Operations (Beth Connelly) to assist you.
- **Professional Services Bid Exemption Form:** Used for services such as consulting, architectural and legal, services. For aggregate purchases of **\$50,000 and over using university funds**, where bidding is not carried out, this form replaces the SSJ.

How to Buy Guide V.9:

The How to Buy Guide has been updated to version 9.0 to reflect these new thresholds and rules. We strongly recommend that you **bookmark the link** to the guide rather than downloading it, as PDS continually updates this document to provide the latest guidance.

Amazon Reminder:

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.

Additional information can be found on our [website](#), in the Amazon training required prior to PCard issuance, in both the P Card and Payment & Reimbursement Policies, and in the February 2026 issue of our [newsletter](#).



Procurement Tip of the Month!



Please **bookmark** and use the official forms page rather than downloading copies of procurement forms, so you always access the **most current versions**:

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

Thank you,

Beth and Nicole

