ALABAMA RURAL HEALTH TRANSFORMATION PROGRAM

# Procurement Support Portal

Subrecipient Step-by-Step Guide

The ARHTP Procurement Support Portal is the single point of entry for every procurement question, review, and approval involving ARHTP funds. It runs on Smartsheet forms, so you do not need a Smartsheet account to use it. This guide walks through each step from your first request to a final determination.

## Procurement Review Form Link

| Form | Link | Form code |
|---|---|---|
| **Procurement Review Request Form** | https://app.smartsheet.com/b/form/01a08d3058267e6b89236f040400fd15 | RHTPalj5r |

*If Smartsheet prompts you for a form code, enter the code shown above.*

## What the portal is for

| Request type | Use it to |
|---|---|
| **Procurement question** | Ask about a planned or ongoing purchase or contract. |
| **Guidance before proceeding** | Confirm the procurement method, threshold, or contract type before you solicit. |
| **Documentation review** | Submit procurement steps you have completed or planned for feedback. |
| **Approval request** | Obtain the written approval required for a conditionally approved budget, a noncompetitive procurement, or a sub-tier subaward. |

## When you must use the portal

Submit before you obligate funds. A review completed after a contract is signed cannot correct deficiencies in the procurement process.

| Situation | Requirement |
|---|---|
| Any noncompetitive or sole source procurement | Written approval before award |
| Any procurement under a conditionally approved budget | Written approval before award |
| Any sub-tier subaward (SRA Section 4.b) | Written approval before execution |
| New contract or purchase order at or above $15,000 | Review before you solicit |
| Modification or expansion of an existing contract using ARHTP funds | Review before you execute the modification |
| Construction or renovation of any value | Written approval before solicitation |
| Procurement initiated or completed before your agreement was executed, if costs will be charged to ARHTP | Submit for review now |

## Step-by-step process

### STEP 1 Prepare before you open the form

Have the following ready. The request form asks for each item.

- Your organization name, entity type, and subaward identifier (Grant ID)
- Subaward amount and the ARHTP funds allocated to this purchase
- Vendor name, contract or PO name, purpose and scope, dollar amount, and start and end dates
- The procurement method you plan to use, and whether any part is noncompetitive
- The contract type: firm fixed price, cost reimbursement, or time and materials
- The state, local, or internal procurement requirements that apply to your organization

### STEP 2 Submit the Procurement Review Request Form

Open the Procurement Review Request Form and complete all three sections.

| Section | What it captures |
|---|---|
| **1. Subrecipient Information** | Organization, submitter contact information, subaward identifier, subaward amount, and funds allocated to this contract or PO |
| **2. Procurement Information** | Entity type, applicable state and local procurement requirements, procurement status, scope, vendor, dates, amount, method, and whether the procurement is noncompetitive |
| **3. Contract Type** | Contract or PO type, an attestation that the contract is not cost-plus-apercentage-of-cost, and any additional information the reviewer should know |

If you are only asking a question, select Procurement Not Yet Started and describe your question in the additional information field. You can stop after Step 3 until we respond.

### STEP 3 Receive your Procurement ID

Smartsheet sends an automatic confirmation to the email you entered. ARHTP staff then assigns a Procurement ID and sends it with the checklist tab or tabs you need to complete. Use the Procurement ID on every document, file name, and follow-up submission for this procurement.

### STEP 4 Complete the Procurement Review Checklist

Open the ARHTP Procurement Review Checklist workbook and enter your Procurement ID on the Request Information tab. Then complete:

- The corresponding checklist for the identified procurement method, as provided by your procurement reviewer.
- Tab G) Alabama and Local Requirements, for every procurement
- For a noncompetitive procurement, the Sole Source and Noncompetitive Procurement Request and Justification Form, as provided by your procurement reviewer.

For each checklist item that has supporting documentation, enter the file name and the page number where the reviewer can find it. Name each file with your Procurement ID and the checklist item number, for example AL-0001_Item3_SAM_Check.pdf.

| STEP 5 | Submit the checklist and attachments |
|---|---|

Open the Checklist Submission Form Link, found in the checklist shared by your procurement reviewer. Enter your Procurement ID, and upload the completed workbook, the sole source form if applicable, and every attachment the checklist calls for. Submissions missing required attachments are returned, which restarts the review.

| STEP 6 | ARHTP reviews your submission |
|---|---|

Review happens in two stages. Expect an initial response within 3 business days of each submission.

| Review stage | What ARHTP checks |
|---|---|
| **1. Initial request review** | Sections 1 through 3 of your request: completeness, method selection, thresholds, and whether the relationship is a contract or a sub-tier subaward |
| **2. Checklist review** | Each checklist item and its supporting documentation, marked Complete, Needs attention, or Not applicable |

If any item is marked Needs attention, you will receive the reviewer's comments. Correct those items and resubmit through the Checklist Submission Form using the same Procurement ID. A procurement may go through more than one round of review.

| STEP 7 | Receive the determination |
|---|---|

ARHTP sends a written determination when review is complete. For a procurement requiring preapproval, the determination is your written approval, approval with conditions, or denial. Do not execute a contract, issue a purchase order, or otherwise obligate ARHTP funds for these procurements until you have it.

| STEP 8 | Keep the record |
|---|---|

File the determination with your procurement records. Retain all documentation for the period required by 2 CFR 200.334 and your Subaward Agreement. A change in vendor, scope, or amount after approval requires a new request.

**IMPORTANT**

Using the portal does not replace the procurement law or written procedures that govern your organization. Every procurement must comply with 2 CFR 200.317 through 200.327 and with any applicable state, local, or organizational requirement. Where those differ, the more restrictive requirement governs.

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Questions about the portal: procurement@alabamarhtp.com