MISSISSIPPI

RURAL HEALTH TRANSFORMATION

Subrecipient Training: Procurement & Reimbursement Processes

November 3, 2026

10:00 a.m. CST

BDO USA, P.C., a Virginia professional corporation, is the U.S. member of BDO International Limited, a UK company limited by guarantee, and forms part of the international BDO network of independent member firms.

Agenda for Today

Subrecipient Duties

Federal Procurement Requirements:
- **Required Contract Provisions**
- **Required Documentation**

Procurement Submission Process

Subrecipient Reimbursement:
- **Documentation Requirements**
- **Reimbursement Timeline**

Reimbursement Submission Process

Questions

Helpful Resources

- Link to Reimbursement Portal: https://apply.mississippirhtp.com/login
- Link to Procurement Submission Portal: https://app.smartsheet.com/b/form/01a08d3058267e6b89236f040400fd15
- Awardees Submit Questions to: awardee@mississippirhtp.com
- Awardee Resources located on Program Website: https://mississippirhtp.com/resources/
  - Awardee Specific FAQs
  - GPO Guidance
  - MWBE Outreach Guidance
  - Procurement Checklists
  - Reimbursement Portal Walkthrough Video
  - Procurement Submission Portal Link

Subrecipient Duties

Subrecipient Key Responsibilities

- **Who is a subrecipient?**
  - A non-Federal entity that receives a subaward from a pass-through entity to carry out part of a Federal program; but does not include an individual that is a beneficiary of such program.
  - A subrecipient may also be a recipient of other Federal awards directly from a Federal awarding agency 2 CFR 200.93.
  - **Important Reminder:** subrecipients under MS RHTP are NOT allowed to further subgrant their funds to others–creating a sub-sub agreement.

Subrecipient Guidance

- **BDO GS is here to help you along the way!**
  - If you have a question about procurement processes/requirements, documentation needs, etc., please reach out to us at the beginning, so we can work alongside you
  - It is better to ask and seek guidance BEFORE you enter into a procurement so that we can help you avoid any missteps that may result in incurring ineligible costs
  - Submit questions to: awardee@mississippirhtp.com

Federal Procurement Rules

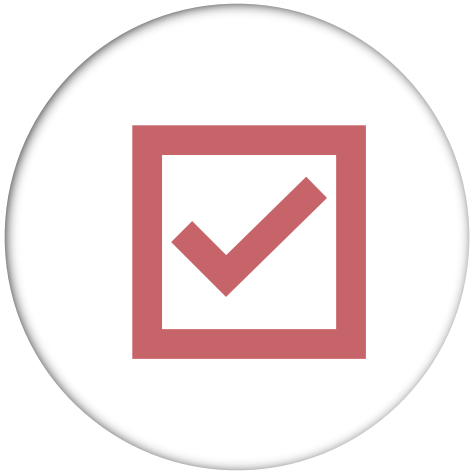
Procurement by Non-Federal Entities



2 CFR 200.317 Non-federal Entities that are not State, Local, or Indian Tribes must comply with the procurement standards in 2 CFR200.318 through 200.327.

Common examples:

- Professional services
- Goods/Equipment purchases
- Construction and Architectural/Engineering (A/E) services



Federal Procurement Rules:
What rules apply to you?

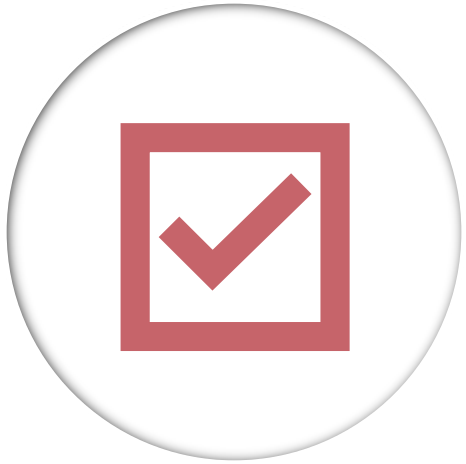
- **All subrecipients in MS RHTP MUST follow federal procurement standards.**

- **If you are an entity that is also subject to Mississippi State Procurement Law, then you are to follow the more stringent of the two standards.**
  - This would apply to entities such as state hospitals
  - All non-federal/non-profit entities are subject to federal procurement only
  - If you have question about which standard you are subject to, please reach out to BDO GS

Applicable Federal Regulations:

1. Code of Federal Regulations *(CFR)*
2. 2 CFR 200.317 – 200.327
3. Uniform administrative requirements
4. Cost Principles

General Procurement Standards – 2 CFR 200.318





- **2 CFR 200.318** Non-federal Entities must have documented procurement procedure in accordance with 2 CFR 200.317-327 when using federal awards.

- **All subrecipients will be required to submit Standard Operating Procedures (SOPs) for review and approval prior to receiving any imbuement payments in this program.**

- **Required SOPs for MS RHTP:**
  - Written policies and procedures
  - Conflict of interest policies
  - Procurement records

Required Policies and Procedures

- 2 CFR 200.318 requires non-Federal entities to have documented procurement procedures which conform to the procurement standards identified in 2 CFR 200.317 – 2 CFR 200.327.
- At a minimum:
  - Policies need to address all requirements of 2 CFR 200.317 – 2 CFR 200.327.

Federal Procurement Thresholds





- Procurement methods are determined by the value of the purchase.
- Thresholds include:
  - micro-purchases
  - Simplified Acquisitions (formerly small purchases)
  - Purchases above the simplified acquisition threshold (SAT)

Entity	Micro-Purchase	Simplified Acquisition (small purchase)	Purchases in Excess of the Simplified Acquisition Threshold
Private Nonprofit	Less than $15,000	$15,000-$350,000	Above $350,000 (i.e. $350,000.01)

Micro-Purchases
2 CFR 200.320(a)(1)





- Applies to purchases up to $15,000.00 for private nonprofit entities
- No quotes needed
- Prices must still be reasonable
- Distribute purchases equitably when possible
- May not split purchases purposefully to remain under threshold

Entity	Micro-Purchase
Private Nonprofit	**Purchases up to $15,000.00**

Simplified Acquisitions
2 CFR 200.320(a)(2)





- Applies to purchases over $15,000 (i.e. $15,000.01) to the SAT
- May not split a larger purchase merely to bring the cost under SAT

Entity	Simplified Acquisition
Private Nonprofit	**Over $15,000 to the SAT of $350,000.00**

Sealed Bids
2 CFR 200.320(b)(2)





- Required to publicly solicit Bids
- Contract awarded to lowest responsible bidder when possible
- Need two or more responsible bidders
- Justification needed if lowest bidder not selected
- Justification needed if one bid received

Entity	Purchases in Excess of the Simplified Acquisition Threshold
Private Nonprofit	**$350,000.01 and above**

Competitive Proposals
2 CFR 200.320(b)(2)





- Typical for professional services
- Proposals evaluated and awarded to most qualified entity
- Evaluation process and criteria must be clear in the Request for Proposals (RFP)
- Price must be an evaluation factor

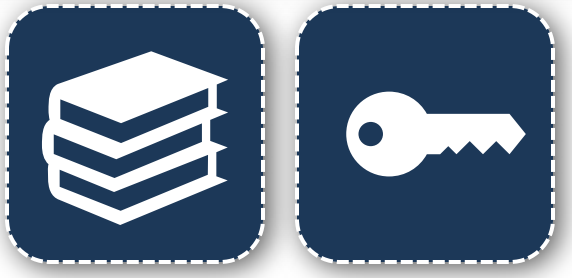
Entity	Purchases in Excess of the Simplified Acquisition Threshold
Private Nonprofit	**$350,000.01 and above**

Noncompetitive Procurements

2 CFR 200.320(c)

- Least-desirable method of procurement
- MUST seek Agency Approval, through BDO GS, Prior to Using Sole Source or Emergency

Micro purchases	Sole-source purchases	Public exigency or emergency	Authorization given by awarding agency	Inadequate competition after public solicitation



Emergency & Exigency

1. Costs must still be reasonable.
2. All efforts must be fully documented & prior approval from State required
3. Once the documented exigency or emergency period ends, subrecipients must transition to a procurement process that includes full and open competition

Sole Source

1. Costs must still be reasonable.
2. All efforts must be fully documented & prior approval from the State required.
3. Must document with memorandum outlining why this procurement could only be performed by a sole source

MBE/WBE Outreach Required

- Federal law **(for all types of purchases above the micro-purchase threshold)** requires governing authorities to take affirmative steps regarding minority and women's business enterprises (MBE/WBEs) as outlined in 2 CFR 200.321(b).

Minority/Women Owned Businesses

2 CFR 200.321(b)(1) – (6)

Minority/Women Owned Businesses Defined:

- Certified Women-Owned Business
- Certified Minority-Owned Business
- Qualified Small Businesses
- Veteran-Owned Businesses
- Labor Surplus Area Firms

Required Affirmative Steps

2 CFR 200.321(b)(1) – (6)

1. Placement on solicitation lists
2. Assurance that these firms are solicited when deemed eligible
3. Dividing requirements when feasible
4. Establishing delivery schedules conducive to participation
5. Using SBA/MBDA
6. Requiring prime contractor to take same steps when subcontracting

MWBE Outreach: *Recommended Steps*

Awardee Type	Recommended Compliance Path
Non-governmental Entity	• Search the Mississippi MDA/MPTAP registry and SBA Small Business Search; • Identify qualified vendors; • Send each the solicitation directly; and • Retain evidence of the searches and outreach
Governmental Entity Subject to MS State Procurement Law	• Post the solicitation through MPTAP/Agency Bid Bank and request targeted distribution to applicable vendors; • Retain the posting and distribution evidence; and • Continue to follow all applicable state procurement rules.

Required Federal Contract Provisions

Required Federal Contract Provisions

- **All contracts must include** "applicable provisions" in Appendix II to 2 CFR Part 200.

- **This applies to all executed contracts where any amount of federal funding will be used to pay for the services/goods contracted for.**

- If you do not have an executed contract but rather are using a PO then you should execute an amendment that includes the required contract provisions and attach that to the PO to ensure the required clauses are included.

- **FEMA Guidance for Contract Provisions:**
  - https://www.fema.gov/sites/default/files/documents/fema_contract-provisions-guide_fy24.pdf

Common Procurement Missteps

Time-and-Material Contracts

2 CFR 200.318(j)

No other contract type is suitable

Contract contains not-to-exceed ceiling

Ceiling must not be so high as to render it meaningless

Cost Plus Percentage of Cost Contracts

2 CFR 200.324(c)

The use of cost-plus percentage of cost and cost plus a percentage of construction cost methods of contracting are prohibited.

Addition of ceiling price does not make these contracts acceptable



Affirmative Outreach

- Federal law **(for all types of purchases above the micro-purchase threshold)** requires affirmative steps to include minority and women's business enterprises (MBE/WBEs) as outlined in 2 CFR 200.321(b) in procurement opportunities.

Policies and Contract Provisions

- 2 CFR 200.318(a) requires non-Federal entities to have documented procurement procedures which conform the procurement standards identified in 2 CFR 200.317 – 2 CFR 200.327.
- At a minimum:
  - Policies need to address all requirements of 2 CFR 200.317 – 2 CFR 200.327.
  - All contracts must include “applicable provisions” in Appendix II to 2 CFR Part 200.

Sole Source Procurement

- This method is to be used sparingly.
- The standard is narrow, and the facts must establish that only one source can perform the work or provide the item.
- Document the market research you conducted, the sources you considered, and why each alternative was unable to meet the requirement.
- Preference for a particular vendor does not support sole source procurement.
- Wanting to continue with an incumbent provider, being familiar with a vendor, having a prior relationship, or believing a specific vendor is the best or easiest choice, not valid basis for a noncompetitive award.

Group Purchasing Organization "GPO"

- If you plan to use a GPO Federal procurement requirements must also be met.
- You must submit and maintain sufficient documentation to demonstrate that the procurement was conducted in accordance with applicable requirements and that the resulting price was reasonable.
- For each purchase made through a GPO, the following documentation is required:
  - The GPO solicitation and evidence that the solicitation was publicly advertised for an adequate amount of time;
  - Documentation of affirmative steps taken by the GPO;
  - The rationale for using the GPO and the basis for selecting the contract/vendor;
  - Documentation supporting the contract price such as a bid tabulation or evaluation/scoring of cost (when a Request for Proposals (RFP) was utilized by the GPO);
  - An independent cost estimate done by the awardee when the cost is anticipated to exceed $350,000.00 (for private and non-profit entities) or $75,000.00 (for governmental entities);
  - Documentation demonstrating that the selected vendor is responsible and not excluded or disqualified from participating in federally funded transactions;
  - The vendor's written agreement that the applicable Federal contract provisions found in 2 CFR 200 Appendix II will govern the purchase; and
  - The executed GPO agreement and any related modifications, and the awardee's contract or purchase order.

Required Procurement Documentation

Submitting Required Procurement Documentation

All subrecipients MUST submit required procurement documentation in the **MS RHTP Procurement Portal only (not by email).**

All procurement documentation MUST be submitted within 10 calendar days of execution of a contract.

Complete documentation must be submitted timely for reimbursements to be processed.

Procurement Documentation:
Micro Purchases (Less than $15K)

- **Micro Purchases-$15,000 or Less for Private Nonprofits:**
  - Competitive solicitation is not required
  - Must have documentation showing that the entity determined that prices for procured goods or services are reasonable based on research, experience, purchase history, or other information.

Procurement Documentation: *Small Purchases*

- **Small Purchases-$15,000.01 to $350,000 for Private Nonprofits:**
  - Public notice (newspaper advertisement/online advertisement) is recommended.
  - Quotes (minimum of 3 quotes are recommended).
  - MBE/WBE outreach
  - All quotes received
  - Executed contract or purchase order with the applicable 2 CFR 200 Appendix II provisions

Procurement Documentation:
Purchases over Simplified Acquisition Threshold

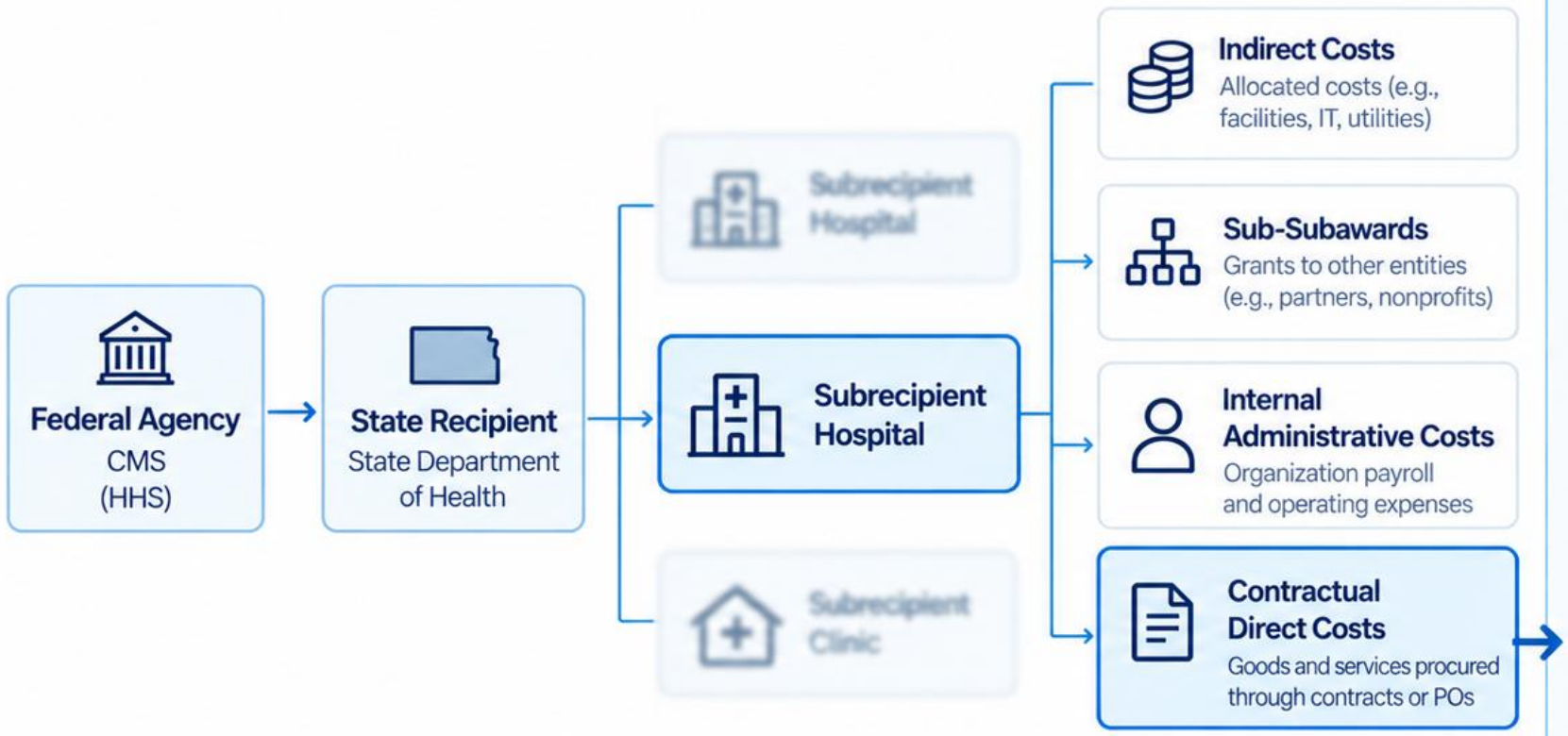
- **Purchases of $350,000.01 or more for Private Nonprofits:**
  - Public advertisement
  - MBE/WBE outreach
  - All bids/proposals received
  - Bid tab/scoring sheets
  - Bid Bond (where required)
  - Performance and Payment Bonds (where required)
  - Executed contract with the applicable 2 CFR 200 Appendix II

Procurement Submission Process

Procurements & Review Process

Where Procurement Fits in the Grant Structure

Your organization is a subrecipient of federal funds. This graphic shows how federal funds flow and highlights where procurement applies within your organization.



Contractual Direct Costs

Goods and services procured through contracts or purchase orders (POs).

- Contractual direct costs are the goods and services your organization procures to carry out the program.
- They are often secured through contractual agreements and purchase orders (POs).
- Federal guidelines categorize procurements by value and require specific procurement methods.

Procurement Methods (by value)

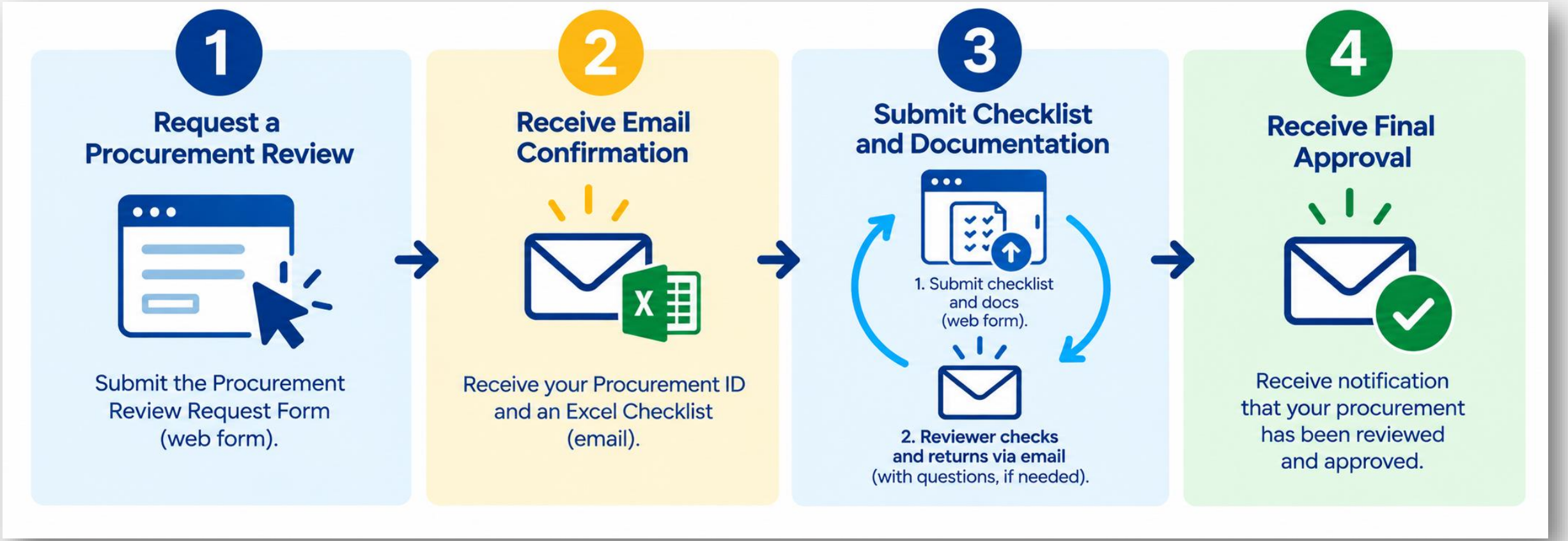
Informal Methods
- Micro-Purchase (typically ≤ $15,000*)
- Simplified Acquisition (typically ≤ $350,000*)

Formal Methods
- Formal Sealed Bids (typically > $350,000*)
- Formal Proposals (typically > $350,000*)

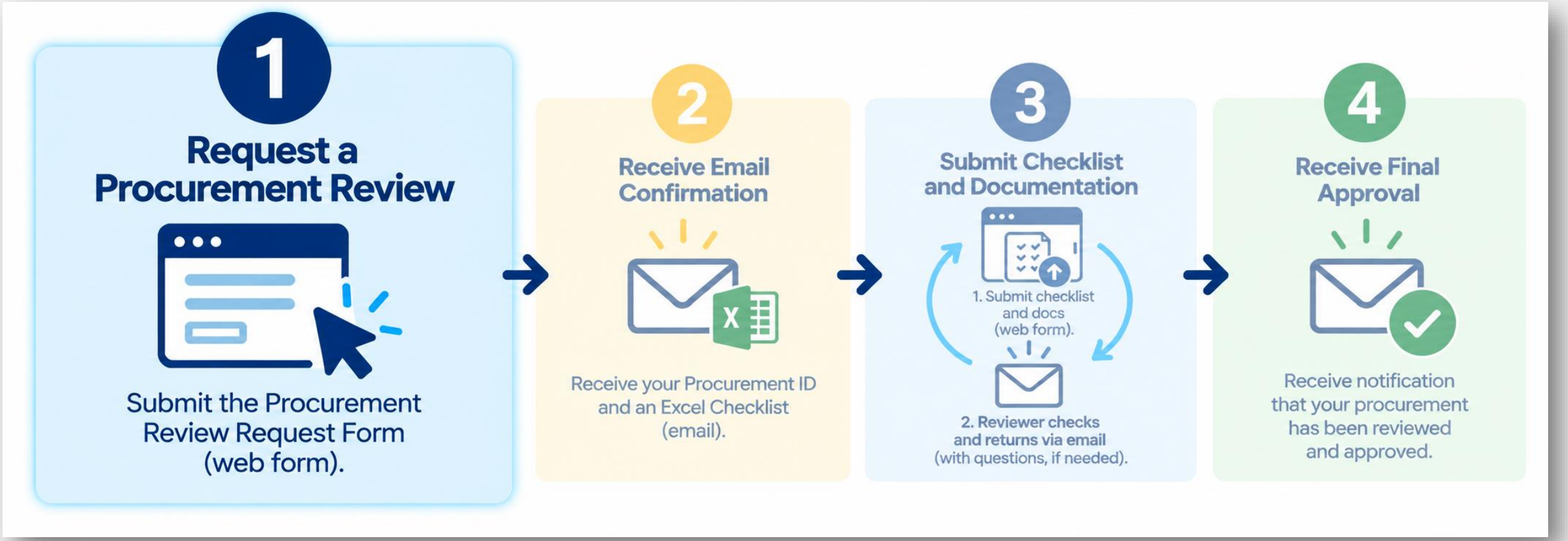
Noncompetitive Procurement
- Allowed only under specific circumstances (e.g., single source, public exigency/emergency, agency approval, inadequate competition).

* State and local procurement laws may impact these thresholds depending on how those laws impact your specific organization.

Procurement Review Process



Procurement Review Process
Step 1: Request a Review



Procurement Review Process

1

Request a Procurement Review



Submit the Procurement Review Request Form (web form).

Step 1: Section 1 — Subrecipient Information

Organization & Contact

Subrecipient Organization Name *
Enter your organization's legal name exactly as it appears in your subaward agreement.

Submitter's Name *
Enter the name of the person submitting this procurement for review. This person will serve as the primary point of contact for questions or requests for additional information.

Submitter Email *
Enter the email address where the Procurement ID, checklist, questions, and other communications regarding this procurement should be sent.

Submitter Phone *
Enter a phone number where the submitter can be reached regarding this procurement.
+1

Program & Funding

State Program *
Select the state program providing the funds that will be used for this procurement.

Subaward Identifier *
Enter the identifier associated with the subaward funding this procurement. Depending on the program, this may be an Application ID, Case ID, Subaward ID, or other award identifier.

Subaward Amount *
Enter the total amount of funds awarded to your organization under your subaward.
#

Award Funds Allocated to Contract/PO *
Enter the **amount of award funds that will be used towards this contract or purchase order.**
NOTE: This amount may differ from the total contract/PO amount if other funding sources will also be used. Enter only the amount funded by this award. You will enter the total contract/PO amount in a separate field below.
#

Procurement Review Process

1

Request a Procurement Review



Submit the Procurement Review Request Form (web form).

Step 1: Section 2 — Procurement Information

Procurement Status & Requirements Acknowledgment

Procurement Status *

Select the option that best describes the current status of this procurement.

- ○ Procurement Not Yet Started
- ○ Procurement in Progress – Vendor Not Selected
- ○ Vendor Selected – Contract/PO Not Executed
- ○ Contract/PO Executed

Procurement Requirements Acknowledgment *

States and Indian Tribes generally follow the same procurement policies and procedures used for purchases with non-Federal funds, subject to the specific Federal requirements identified in 2 CFR § 200.317.

All other subrecipients must follow the Federal procurement standards in 2 CFR §§ 200.318–200.327, while also complying with applicable State and local procurement requirements. When requirements differ, the procurement must satisfy both. For example, if an applicable State or local procurement threshold is lower than the Federal threshold, the lower threshold applies. If no State or local procurement requirements apply, such as may be the case for a private nonprofit, the Federal procurement standards govern.

- ☐ I acknowledge that each subrecipient is responsible for understanding which Federal, State, and local procurement requirements apply to its organization and for conducting this procurement accordingly.

Procurement Review Process

1

Request a Procurement Review



Submit the Procurement Review Request Form (web form).

Step 1: Section 2 — Procurement Information

Procurement Method

Procurement Method *

Select the procurement method or purchasing arrangement used or anticipated for this procurement. Applicable federal procurement thresholds are based on the total contract/PO amount and may be subject to additional state, local, tribal, or organizational restrictions.

NOTE: **If using an existing cooperative or GPO contract,** *begin requesting the underlying procurement documentation for the GPO contract as early as possible. These types of agreements may require additional time to provide solicitation, competition, evaluation, award, and contract documentation. The procurement review cannot be completed without sufficient documentation of the procurement used to establish the underlying contracts. There is no documentation exception solely because a GPO or cooperative purchasing arrangement was used.*

- ◯ Micro-Purchase ($0.00-15,000.00 only)
- ◯ Simplified Acquisition / Multiple Quotes ($350,000.00 or less)
- ◯ Formal Sealed Bid (required >$350,000.00)
- ◯ Formal Proposal (required >$350,000.00)
- ◯ Existing Cooperative or Group Purchasing Organization (GPO) Contract
- ◯ Noncompetitive Procurement (Requires specific circumstances detailed in next question.)

Procurement Review Process

1

Request a Procurement Review



Submit the Procurement Review Request Form (web form).

Step 1: Section 3 — Contract Type

Contract Type & Cost-Plus Attestation

Section 3: Contract Type

This section collects information about how the contractor will be compensated and confirms that prohibited cost-plus-percentage-of-cost contracting will not be used.

Cost Plus Attestation *

A cost-plus-percentage-of-cost arrangement reimburses a contractor's costs and calculates the contractor's fee or profit as a percentage of those costs. Because the contractor's compensation automatically increases as costs increase, this contracting method is prohibited under 2 CFR § 200.324(d).

NOTE: A percentage may be used as part of establishing or negotiating a fixed dollar amount, provided the resulting fee or price does not automatically increase as actual costs increase.

Select "Yes" to attest that you have read and understand this requirement and that the proposed contract does not use a cost-plus-percentage-of-cost arrangement.

- ◯ Yes

Contract/PO Type *

Select the contract type that best describes how the contractor will be compensated.

- ◯ Fixed Price — (including fixed-price purchase orders and unit-price arrangements) Contractor is paid an established price for specified goods, services, units, or deliverables.
- ◯ Cost Reimbursement — Contractor is reimbursed for allowable costs incurred under the contract, with any additional fee established separately and not calculated as a percentage of actual costs.
- ◯ Time and Materials — Contractor is paid based on actual labor hours at fixed hourly rates plus the actual cost of materials. Time-and-materials contracts must include a ceiling price that the contractor exceeds at its own risk.

Procurement Review Process

1

Request a Procurement Review



Submit the Procurement Review Request Form (web form).

Step 1: Final Details and Submission

Review Your Information and Submit

Complete any final details, confirm your answers, and submit your Procurement Review Request Form. This will send your request to the review team for assessment and let you know what documentation is needed.

Before You Submit

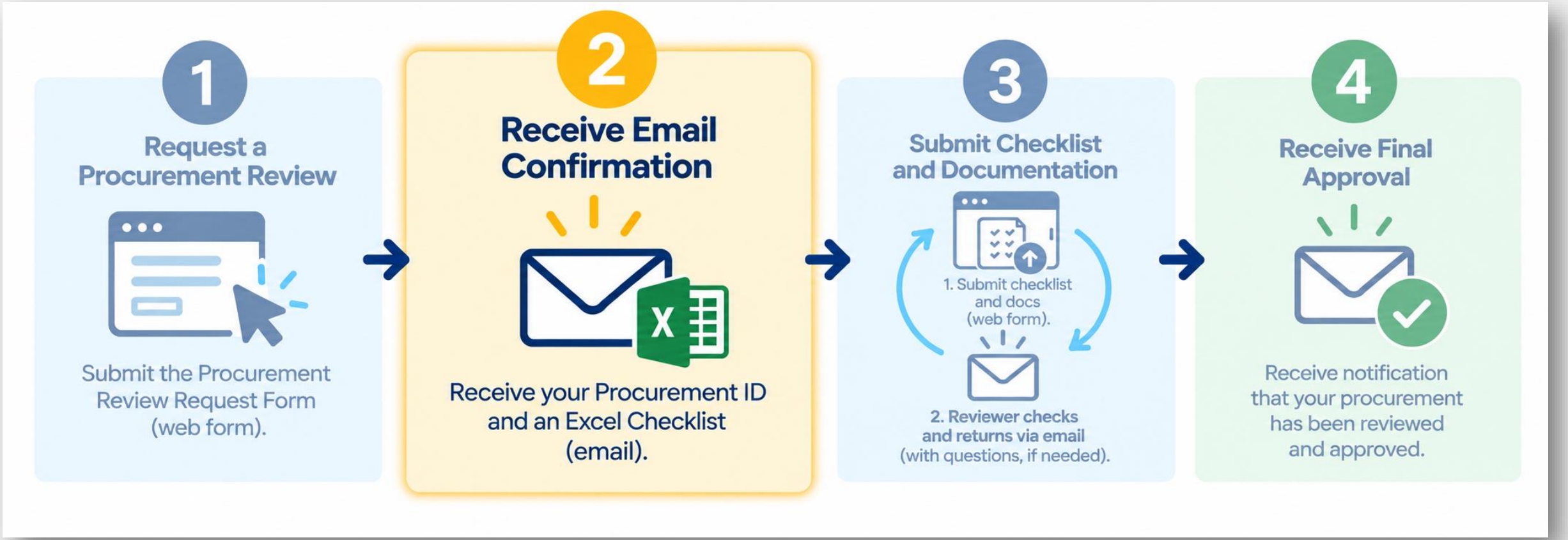
- **Complete all required fields.**
  Look for fields marked with an asterisk (*).
- **Provide any additional procurement information.**
  Include details that may help the review team understand the procurement, purchasing arrangement, or proposed contract.
- **Review for accuracy.**
  Confirm your responses and supporting information.
- **Click Submit.**
  Your request will be sent to the review team.

Additional Procurement Information

Provide any additional information that may help the review team understand the procurement, purchasing arrangement, or proposed contract.

Submit

Procurement Review Process
Step 2: Receiving Procurement ID



Procurement Review Process

2

Receive Email Confirmation



Receive your Procurement ID and an Excel Checklist (email).

Step 2: Receive Email Confirmation

You'll Receive an Email with Your Checklist

Within 2 business days of submitting your Procurement Review Request Form, you will receive an email with your unique Procurement ID and a customized Excel checklist.

Reply | Reply All | Forward | ...

Procurement Checklist – MS-P0008

Reviewer@bdogov.com Wed 9/23/2026 4:53 PM
To John.Smith@testentity.com

Procurement_Checklist_MS-P0008.xlsx
120 KB

Dear John Smith,

Thank you for submitting a procurement review request. Your Procurement ID is: **MS-P0008.** Please reference this ID in all correspondence related to this procurement.

Your procurement checklist is included as an attachment to this message.

Review the pre-filled portions for accuracy. If any corrections are needed, they may be submitted using the form link located at the bottom of the checklist. Complete the checklist to the fullest extent possible. You may submit it to our review team for a preliminary review at any time using the submission link included within the checklist.

If you have any questions regarding this procurement, please feel free to reply to this email. For submitting updated checklists, supporting documentation, or items requiring formal review, use the submission form link provided in the checklist.

Sincerely,

BDO Government Services
Grant Management Team
Reviewer@bdogov.com

From
You'll receive this email from Reviewer@bdogov.com.

Procurement ID
Your unique Procurement ID is provided in the email. Please reference this ID in all correspondence.

Attached Checklist
A customized Excel checklist is attached to the email.

Next Steps
Review the pre-filled information, complete the checklist, and use the form link in the checklist to submit supporting documentation or updates.

Procurement Review Process

2

Receive Email Confirmation



Receive your Procurement ID and an Excel Checklist (email).

Step 2: Open the Checklist – Section A

Section A: Prefilled Procurement Information

The first section of your checklist is prefilled based on the information you submitted in the Procurement Review Request Form.

Procurement_Checklist_MS-P0008.xlsx

	Item	Question	Response	Filename	Page Number	Needs Attention	Complete	Reviewer Comments
1	Procurement ID MS-P0008		Small Purchase - Multiple Sources Procurement Checklist					
	Section A: Attention Subrecipients: Selections in section A reflect the current status of your procurement. This information may change as more details become available. You will have the opportunity to provide updates to these fields via the RFI Response Form link at the bottom of this page.							
2	A1	Initial PID Request Date	09/23/26	-	-	☐	☑	
3	A2	Procurement ID	MS-P0008	-	-	☐	☑	
4	A3	Submitting Organization Name	County Hospital	-	-	☐	☑	
4	A4	Submitter Name	John Smith	-	-	☐	☑	
5	A5	Submitter Email	john.smith@testentity.com	-	-	☐	☑	
7	A6	Submitter Phone	+1 (601) 555-5555	-	-	☐	☑	
8	A7	State Program	Mississippi	-	-	☐	☑	
9	A8	Subaward Identifier	12-1234-10	-	-	☐	☑	ID was corrected. No action needed.
10	A9	Subaward Amount	$1,500,000.00	-	-	☐	☑	
12	A10	Award Funds Allocated to Contract/PO	$250,000.00	-	-	☐	☑	
12	A11	Entity Type	PRIVATE ENTITY - A non-governmental organization, including most private nonprofit and for-profit organizations.	-	-	☐	☑	
13	A12	State Procurement Requirements	No	-	-	☐	☑	
13	A13	Local Procurement Requirements	No	-	-	☐	☑	
13	A14	Procurement Status	Contract/PO Executed	-	-	☐	☑	
16	A15	Contract/PO Name	Data Services Contract	-	-	☐	☑	
15	A16	Procurement Purpose/Scope	ABC Data Services (the Contractor) shall provide County Hospital (the Hospital) data services supporting Hospital activities under the Rural Health Transformation Program. Services may include data collection, validation, integration, analysis, reporting, dashboard support, data-quality review, and preparation of program-related datasets and reports as directed by the Hospital.	-	-	☐	☑	
25	A17	Vendor Name	ABC Data Services	-	-	☐	☑	
23	A18	Contract/PO Start Date	10/01/26	-	-	☐	☑	
23	A19	Contract/PO End Date	09/30/27	-	-	☐	☑	
23	A20	Contract/PO Amount	$300,000.00	-	-	☐	☑	
26	A21	Procurement Method	Simplified Acquisition / Multiple Quotes ($350,000.00 or less)	-	-	☐	☑	
23	A22	Noncompetitive Procurement	N/A – Not Applicable (Noncompetitive procurement is not being used.)	-	-	☐	☑	
23	A23	Contract/PO Type	Fixed Price — (including fixed-price purchase orders and unit-price arrangements) Contractor is paid an established price for specified goods, services, units, or deliverables.	-	-	☐	☑	

Prefilled Information
Section A is automatically populated based on your Procurement Review Request Form submission.

Review for Accuracy
Review the prefilled information to make sure it is accurate.

Changes Indicated by Reviewer
If any items were updated during the initial review, it will be noted in the Reviewer Comments column.

This Section Cannot Be Edited
Section A is view-only. It may need to be updated. If a correction is needed, use the RFI Response Form (link provided in the checklist). This process will be covered in a later step.

Procurement Review Process

2

Receive Email Confirmation



Receive your Procurement ID and an Excel Checklist (email).

Step 2: Open the Checklist – Section B

Section B: Document Your Procurement Progress

Use Section B to record the required steps and documentation as you progress through the procurement process. Be clear and thorough so the review team can easily find and understand your supporting documentation.

Procurement_Checklist_MS-P0008.xlsx

	Item	Question	Response	Filename	Page Number	Needs Attention	Complete	Reviewer Comments
1		Procurement ID MS-P0008		Small Purchase - Multiple Sources Procurement Checklist				
2		**Section B:** **Attention Subrecipients:** Use the checklist below to record the required steps and documentation as you progress through the process you are receiving process. Be clear and thorough so reviewers can understand. Once the checklist from a member of the review team, items needing attention will be orange. Completed items will be grayed out and locked. Reviewer comments will be in the adjacent column describing any required changes.						
		IMPORTANT: ***To ensure a timely review process****, when completing a checklist item that has a corresponding file, provide the page number where the reviewer can locate the item that satisfies the checklist requirement. Complex documents or documents with multiple sections should have clear instructions for reviewers in the response field.*						
2	1	As an attachment, please provide at least two quotes from qualified sources. Quotes may be obtained through internet search, vendor price listing, verbal quotes, etc. [2 CFR 200.320(a)(2)(i)]				☐	☐	
3	2	Was the quote selected the lowest price among the quotes received?				☐	☐	
3	3	Document how the determination for choosing the selected quote was made—did you choose the lowest quote, and if not, why?				☐	☐	
4	4	As an attachment, please provide the documentation showing that you verified that the vendor has not been debarred or suspended on SAM.gov. [2 CFR 200.318(h)]				☐	☐	
5	5	If you chose a Time and Materials Contract, document why a Fixed Price or Cost Reimbursement contract would not be suitable and why the Time and Materials Contract was selected. [2 CFR 200.318(i)(1)]				☐	☐	

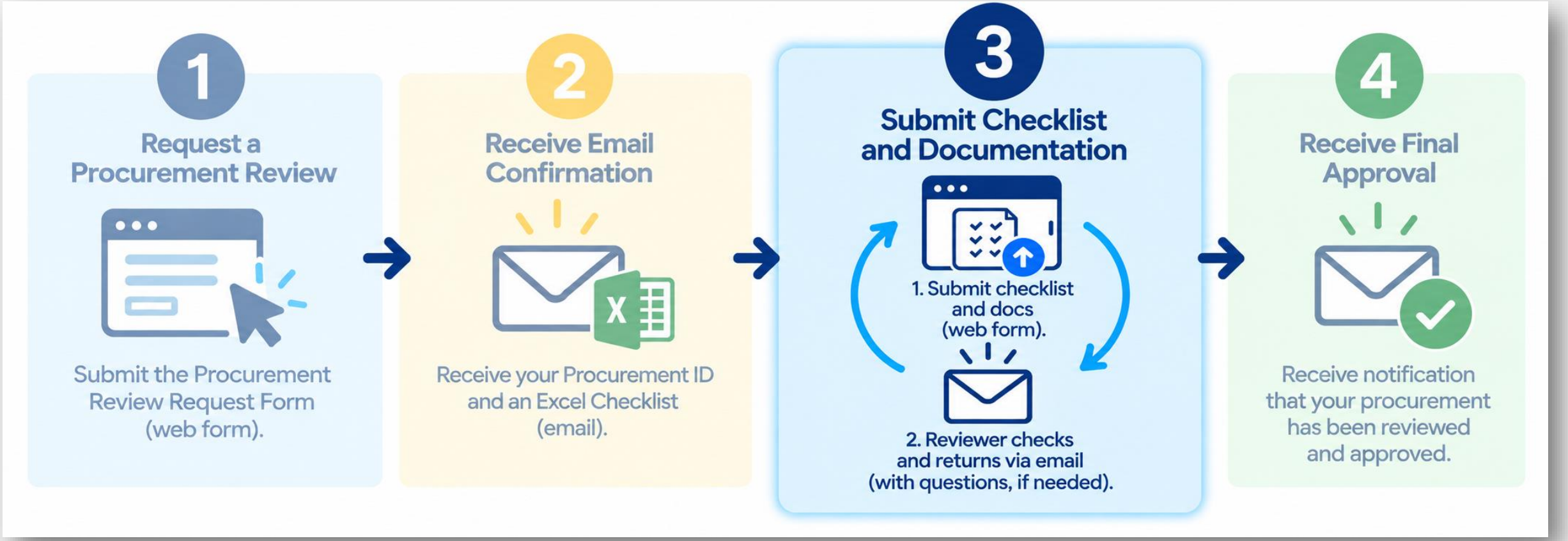
Record Your Progress
Provide clear, complete responses for each item in Section B as you complete your procurement steps.

Reference Your Files
List the filename and page number where the reviewer can find the supporting documentation.

Be Clear and Detailed
Include enough information for the review team to navigate your files. Clear communication is the primary factor in a quick review cycle.

Items Needing Attention
If the review team needs additional information, the item will be highlighted in orange and a comment will be provided.

Procurement Review Process
Step 3: Completing Checklist



Procurement Review Process

3

Working in the checklist



Receive your Procurement ID and an Excel Checklist (email).

Working in the Checklist

Section B: Document Your Procurement Progress

Use Section B to record the required steps and documentation as you progress through the procurement process. Be clear and thorough so the review team can easily find and understand your supporting documentation.

Procurement_Checklist_MS-P0008.xlsx

	Procurement ID MS-P0008	Small Purchase - Multiple Sources Procurement Checklist						
2	Item	Question	Response	Filename	Page Number	Needs Attention	Complete	Reviewer Comments
	Section B: **Attention Subrecipients:** Use the checklist below to record the required steps and documentation as you progress through the procurement process. If you are receiving a reviewed copy of this checklist from a member of the review team, items needing attention will be orange. Completed items will be grayed out and locked. Reviewer comments will be in the adjacent column describing any required changes. ***IMPORTANT:*** *To ensure a timely review process, when completing a checklist item that has a corresponding file, provide the page number where the reviewer can locate the item that satisfies the checklist requirement. Complex documents or documents with multiple sections should have contract-level clear instructions for reviewers in the response field.*							
2	1	As an attachment, please provide at least two quotes from qualified sources. Quotes may be obtained through internet search, vendor price listing, verbal quotes, etc. [2 CFR 200.320(a)(2)(i)]	Attached 2 quotes: ABC Data Services and HealthTech Solutions. Both meet specifications.	Quotes.pdf	All	☐	☐	
2	2	Was the quote selected the lowest price among the quotes received?	No. The lowest quote did not meet all required specifications (lacked data integration capability). Selected quote best meets needs.	Quotes.pdf	2	☐	☐	
3	3	Document how the determination for choosing the selected quote was made—did you choose the lowest quote, and if not, why?	See price analysis and comparison matrix. Selected vendor provided the best value considering required features, implementation support, and service level agreement.	Market_Research.pdf	3-5	☐	☐	
4	4	As an attachment, please provide the documentation showing that you verified that the vendor has not been debarred or suspended on SAM.gov. [2 CFR 200.318(h)]	SAM.gov search completed on 09/15/26. Vendor is not debarred or suspended. See attached.	SAM_Search_ABC.pdf	1	☐	☐	
5	5	If you chose a Time and Materials Contract, document why a Fixed Price or Cost Reimbursement contract would not be suitable and why the Time and Materials Contract was selected. [2 CFR 200.318(i)(1)]	N/A – Fixed Price contract selected.	N/A	N/A	☐	☐	

Enter Your Responses

Record the required information for each item in **Section B** as you complete your procurement steps.

Reference Your Files

List the filename and page number where the reviewer can find the supporting documentation.

Be Clear and Detailed

Provide enough information for the review team to navigate your files. Clear communication is the primary factor in a quick review cycle.

Procurement Review Process

3

Submit Your Checklist and Documents



Once you have completed Section B, click the link at the bottom of the checklist to submit your checklist and upload your supporting documents.

Step 3: Submit Your Checklist and Documents

Submit Your Completed Checklist

After you have entered your responses and gathered your supporting documents, click the RFI Response Form link at the bottom of the checklist to submit your materials for review.

	B	C	D	E	F	G	H	J
1		Procurement ID MS-P0008		Small Purchase - Multiple Sources Procurement Checklist				
3	Item	Question	Response	Filename	Page Number		Needs Attention	Complete	Reviewer Comments
8									
30	1	As an attachment, please provide at least two quotes from qualified sources. Quotes may be obtained through internet search, vendor price listing, verbal quotes, etc. [2 CFR 200.320(a)(2)(i)]	2 quotes are attached.	quotes.pdf	All		☐	☐	
31	2	Was the quote selected the lowest price among the quotes received?	No	n/a	n/a		☐	☐	
32	3	Document how the determination for choosing the selected quote was made—did you choose the lowest quote, and if not, why?	Selected based on required services and experience.	market_research.pdf	3		☐	☐	
33	4	As an attachment, please provide the documentation showing that you verified that the vendor has not been debarred or suspended on SAM.gov. [2 CFR 200.318(h)]	SAM.gov search attached.	sam_gov.pdf	1		☐	☐	
34	5	If you chose a Time and Materials Contract, document why a Fixed Price or Cost Reimbursement contract would not be suitable and why the Time and Materials Contract was selected. [2 CFR 200.318(i)(1)]	Not applicable (Fixed Price).	n/a	n/a		☐	☐	
54		Submit Updated Checklists & Documents HERE:							
55		RFI Response Form							
61									

Procurement Review Process

3

Submit Your Checklist and Documents



Once you have completed Section B, click the link at the bottom of the checklist to submit your checklist and upload your supporting documents.

Identify Your Procurement

Complete Step 1 on the Submission Form

Enter the Procurement ID and Procurement Name exactly as shown in your procurement checklist and the email you received.

RURAL HEALTH TRANSFORMATION

Procurement Documentation Uploads Form

Fields marked with an asterisk (*) are required.

Step 1: Identify Your Procurement

Procurement ID *

Enter the associated Procurement ID for the files you are uploading. This number will be listed at the top of your excel procurement checklist and in the email you received as a result of your initial request for a procurement review. If you need to start a new request for a procurement ID, click here.

Procurement Name *

Enter the name that describes the procurement. (Line A15 in your checklist)

1 Enter Procurement ID

Use the same Procurement ID shown at the top of your checklist and in the email you received (e.g., MS-P0008).

2 Enter Procurement Name

Enter the name that describes your procurement (Line A15 in your checklist).

Procurement Review Process

3

Upload Checklist and Supporting Documentation

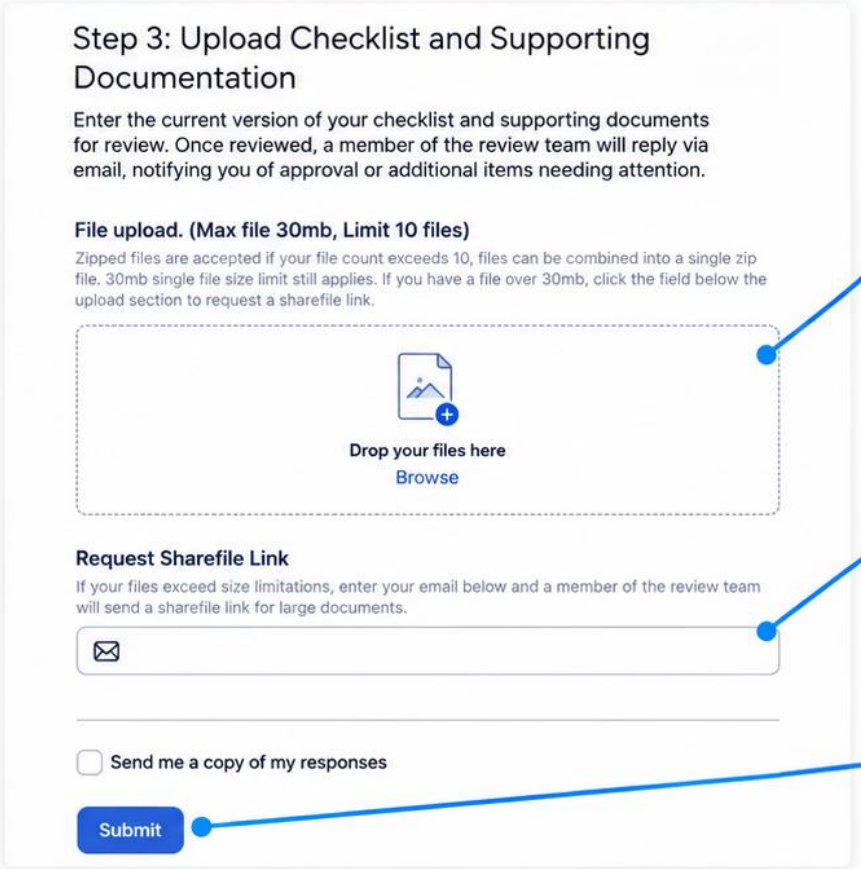


Submit your checklist and supporting documents to our review team.

Upload Checklist and Supporting Documentation

Complete Step 3 on the Submission Form

Enter the current version of your checklist and supporting documents for review. Once reviewed, a member of the review team will reply via email, notifying you of approval or additional items needing attention.



1 Upload Your Files

Add your completed checklist and any supporting documents. You can drag and drop files or click Browse to select files. (Max file 30mb, limit 10 files.)

2 Request a Sharefile Link (if needed)

If your files exceed the size limitations, enter your email and a member of the review team will send a sharefile link for large documents.

3 Submit

Click Submit to send your checklist and supporting documents to our review team.

Procurement Review Process

3 Items Needing Attention



The procurement process is seldom a one and done operation. There will be a back and forth communication between you and your reviewer.

Items Needing Attention

After sending in your checklist via the form submission, your reviewer will review and respond with either 1) an approval notification, or 2) the checklist with flagged items.

	Procurement ID MS-P0008	Small Purchase - Multiple Sources Procurement Checklist					
Item	Question	Response	Filename	Page Number	Needs Attention	Complete	Reviewer Comments
Section B: **Attention Subrecipients:** Use the checklist below to record the required steps and documentation as you progress through the procurement process. If you are receiving a reviewed copy of this checklist from a member of the review team, items needing attention will be orange. Completed items will be grayed out and locked. Reviewer comments will be in the adjacent column describing any required changes.							
IMPORTANT: ***To ensure a timely review process,*** *when completing a checklist item that has a corresponding file, provide the page number where the reviewer can locate the item that satisfies the checklist requirement. Complex documents or documents with multiple sections should have clear instructions for reviewers in the response field.*							
1	As an attachment, please provide at least two quotes from qualified sources. Quotes may be obtained through internet search, vendor price listing, verbal quotes, etc. [2 CFR 200.320(a)(2)(i)]	2 quotes are attached.	quotes.pdf	All	☐	☑	
2	Was the quote selected the lowest price among the quotes received?	No	n/a	n/a	☐	☑	
3	Document how the determination for choosing the selected quote was made—did you choose the lowest quote, and if not, why?	No, the higher priced quote was selected because the services better aligned with our needs. Market research indicates the higher price was within range of industry norms.	market_research.pdf	All	☐	☑	
4	As an attachment, please provide the documentation showing that you verified that the vendor has not been debarred or suspended on SAM.gov. [2 CFR 200.318(h)]	Attached	sam_gov.pdf	1	☑	☐	File will not open. Please resend using RFI Submission Form
5	If you chose a Time and Materials Contract, document why a Fixed Price or Cost Reimbursement contract would not be suitable and why the Time and Materials Contract was selected. [2 CFR 200.318(i)(1)]				☐	☐	
6	For a Time and Materials Contract, what is the ceiling price in the contract?				☐	☐	
7	For a Time and Material Contract, what actions were taken to provide oversight to obtain				☐	☐	

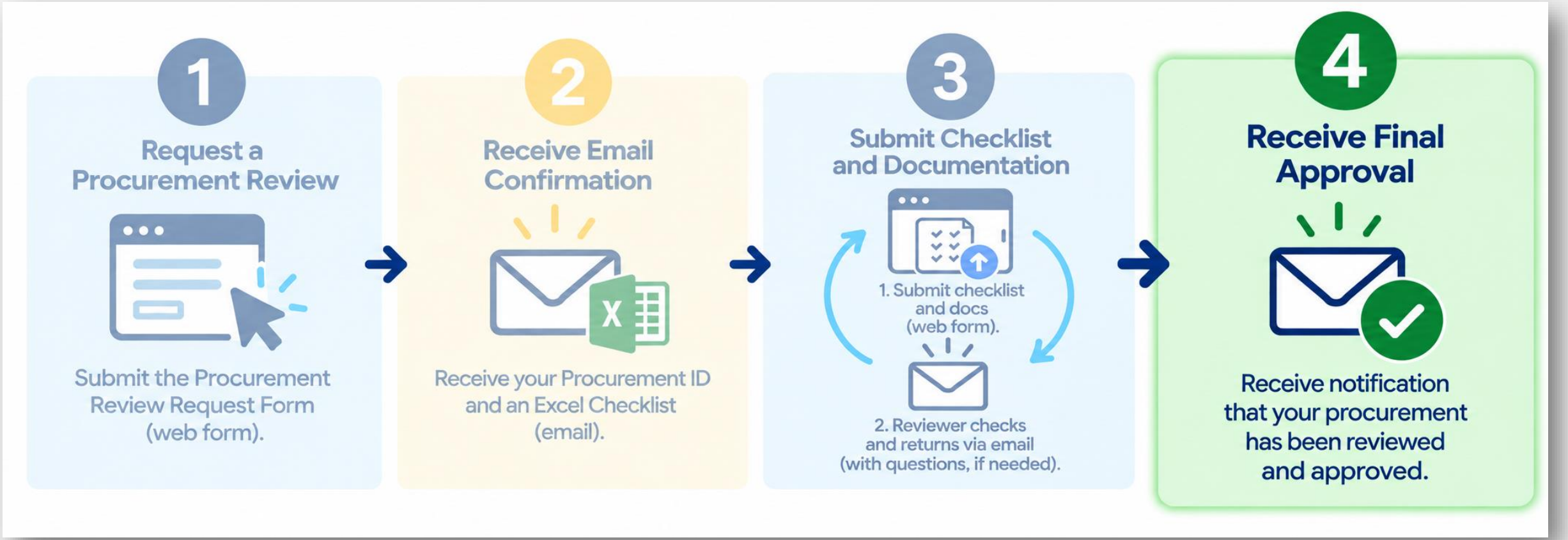
Completed Items
Items checked complete by the reviewer are locked and blue.

Items Needing Attention
Items needing attention are checked and orange and unlocked. Review the reviewer comments and provide the requested information.

Not Started Items
Items not started are white and unlocked.

Once you have provided the needed information, the form submission process using the link at the bottom of the checklist is repeated until the process is complete.

Procurement Review Process
Step 4: Receive Final Approval



Procurement Review Process

4

Receive Final Approval



Receive notification that your procurement has been reviewed and approved.

Receive Final Approval

Upon completion, Subrecipient will receive a copy of their completed checklist via email.



Procurement_Checklist_MS-P0008.xlsx

	Procurement ID MS-P0008	Small Purchase - Multiple Sources Procurement Checklist					
Item	Question	Response	Filename	Page Number	Needs Attention	Complete	Reviewer Comments
	Section B: Attention Subrecipients: Use the checklist below to record the required steps and documentation as you progress through the procurement process. If you are receiving a reviewed copy of the checklist from the review team, items needing attention will be unlocked, filled out and locked. Reviewer comments will be in the adjacent column describing any required changes.						
	IMPORTANT: *To ensure a timely review process, when completing a checklist item that has a corresponding file, provide the page number or other guidance, to help the team locate the relevant information. Complex documents or documents with multiple sections should have clear instructions for reviewers in the response field.*						
1	As an attachment, please provide at least two quotes from qualified sources. Quotes may be obtained through internet search, vendor price listing, verbal quotes, etc. [2 CFR 200.320(a)(2)(i)]	2 quotes are attached.	quotes.pdf	All	☐	☑	
2	Was the quote selected the lowest price among the quotes received?	No	n/a	n/a	☐	☑	
3	Document how the determination for choosing the selected quote was made—did you choose the lowest quote, and if not, why?	No, the higher priced quote was selected because the services better aligned with our needs. Market research indicates the higher price was within range of industry norms.	market_research.pdf	All	☐	☑	

The procurement PIN, contract value, and scope are now an approved expenditure.

The procurement PIN will be used for reimbursements in order to track expenditures against the approved procurements and contracts.

You will receive a copy of your completed checklist via email for your records.

Procurement Review Process

4

Receive Final Approval



Receive notification that your procurement has been reviewed and approved.

What If My Approved Procurement Changes?

Contracts change, situations change. If at any point after your procurement is approved, the form link at the bottom of your checklist can be used to request updates that impact your procurement.



Use the Form Link

Use the form link at the bottom of your checklist to request updates that impact your approved procurement.

Examples of Changes

Contract changes, scope changes, vendor changes, or other situations that impact your procurement.

Receive a Response

A member of the review team will review your request and respond via email.

Reimbursement Requests:
Timeline for Submissions & Payments

Reimbursement Process:
When do you submit?

- **Incurred costs must be submitted monthly basis to the portal:**
  - **https://apply.mississippirhtp.com/**

- **Reimbursement requests will be processed for payment on the 25th of each month**
  - **BDO GS will prepare a batch upload of all approved reimbursements for the State Agency on the 25th of each month**
  - **Reimbursement requests must be submitted no later than the 15th of each month with all required documentation to be included in the upload to the applicable state agency on the 25th of that month**

- **The State Agency will submit approved payments to MAGIC**
  - **Once payments are put into MAGIC, DFA will process payments via PAYMODE**

- **All subrecipients must be registered with PAYMODE in order to receive payment in this program. Please ensure that you have previously provided all procurement documentation to substantiate the underlying contract associated with each invoice.**

Requests for Controlled Advance:
I.e. Modified Reimbursement Process

- Payments under MS RHTP will be made on a reimbursement basis in the majority of cases

- If a subrecipient needs to request a modified payment process in the form of a controlled advanced payment a request form must be submitted to the awardee@mississippirhtp.com email

- **Advance payments will be approved on a VERY LIMITED CONTROLLED BASIS**

- **Advances are the exception not the norm in this program**

Requests for Controlled Advance:
I.e. Modified Reimbursement Process

- **<u>Steps/Criteria for Advance Model:</u>**
  - **Submit a formal request using the required controlled advance request form to <u>awardee@mississippirhtp.com</u>**

    - Justification required demonstrating why an advance is necessary
    - Detailed description of expenditures that will be funded by the advance
    - Description of anticipated consequences if the advance is not approved
    - Organization's current unrestricted cash balance available for operations
    - How many months of operating expenses could the organization cover using available unrestricted cash reserves?
    - Description of whether the organization explored other sources of funding to bridge project costs until reimbursement could be received
    - Resources available to the entity to bridge funding gaps
    - Description of whether a procurement is required for these expenses

Requests for Controlled Advance:
I.e. Modified Reimbursement Process

- **If approved, subrecipients granted a controlled advance will be required to pay approved expenses with the advance within 3 business days.**

- **Subrecipients must submit proof of payment documentation in the portal within 5 business days of payment by the subrecipient.**

- **Failure to timely pay and produce payment documentation may result in termination of your grant agreement.**

Reimbursement Requests: *Required Documentation*

Reimbursement Requests: What is sufficient documentation?

- **Complete procurement file** must have been previously submitted and approved BEFORE a reimbursement will be paid that is tied to that procurement:

  Please include the procurement ID number in your reimbursement request that applies to the reimbursement you are submitting for payment

- **Copy of Invoice or purchase order** tied to the line item(s) in the reimbursement request

- **Proof of Payment** for the line item(s) in the reimbursement request

Reimbursement Requests:
How to Submit Your Reimbursement Request

Reimbursement Requests:
Who is authorized to submit?

- **Who has access and ability to submit reimbursement requests in the portal?**
  - Currently, the individual who created the account and submitted the application has access to submit reimbursements and procurement documentation.

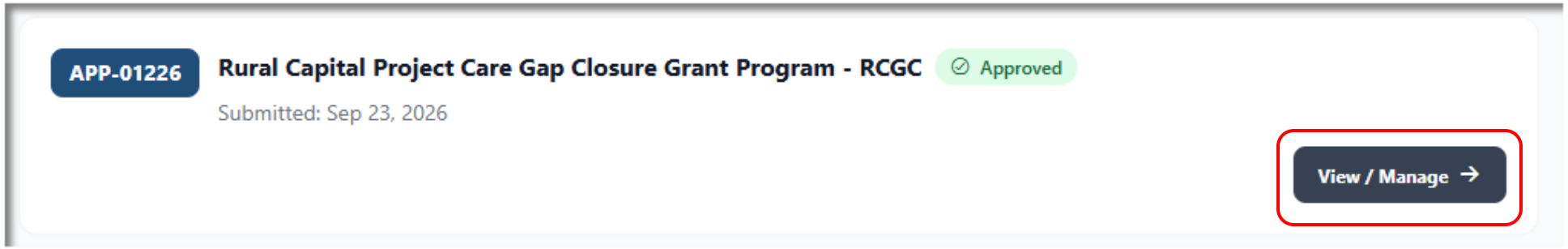
  - You can elect to change or add an additional user account for reimbursement submissions by completing an "organization members and shared applications" form and sending it to awardee@mississippirhtp.com

Reimbursement Requests: How do I submit?

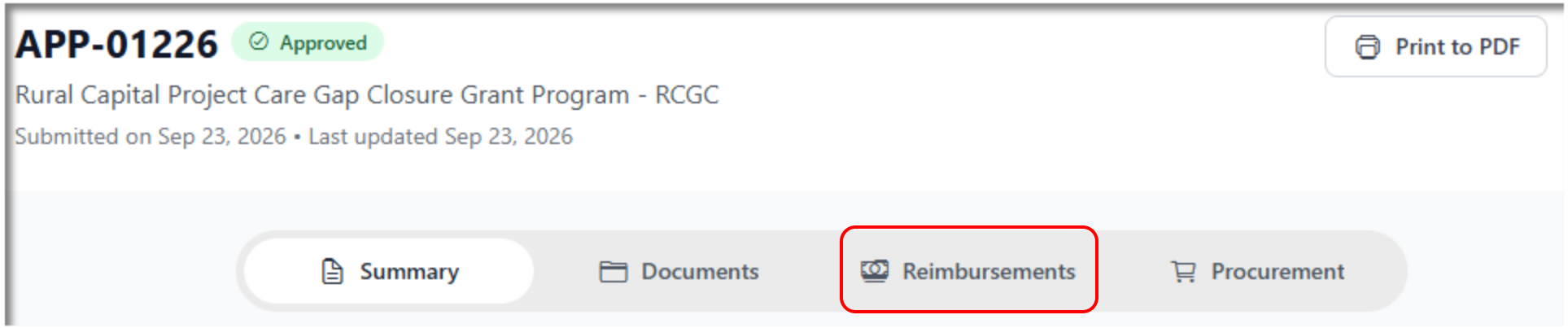
- Reimbursement requests are made through the application portal.
- For applications that were approved and awarded, the awardee will go back into that application from the main page selecting “View/Manage” in the applicable application box.
- From here, the are four options to select from at the top:
  - Summary – shows application submitted
  - Documents – shows all documents submitted
  - Reimbursements – where the reimbursement process begins
  - Procurement – where the procurement process begins
- The awardee will now need to select the “Reimbursements” tab.

Reimbursement Requests: *How to Submit?*

- **Step 1:**



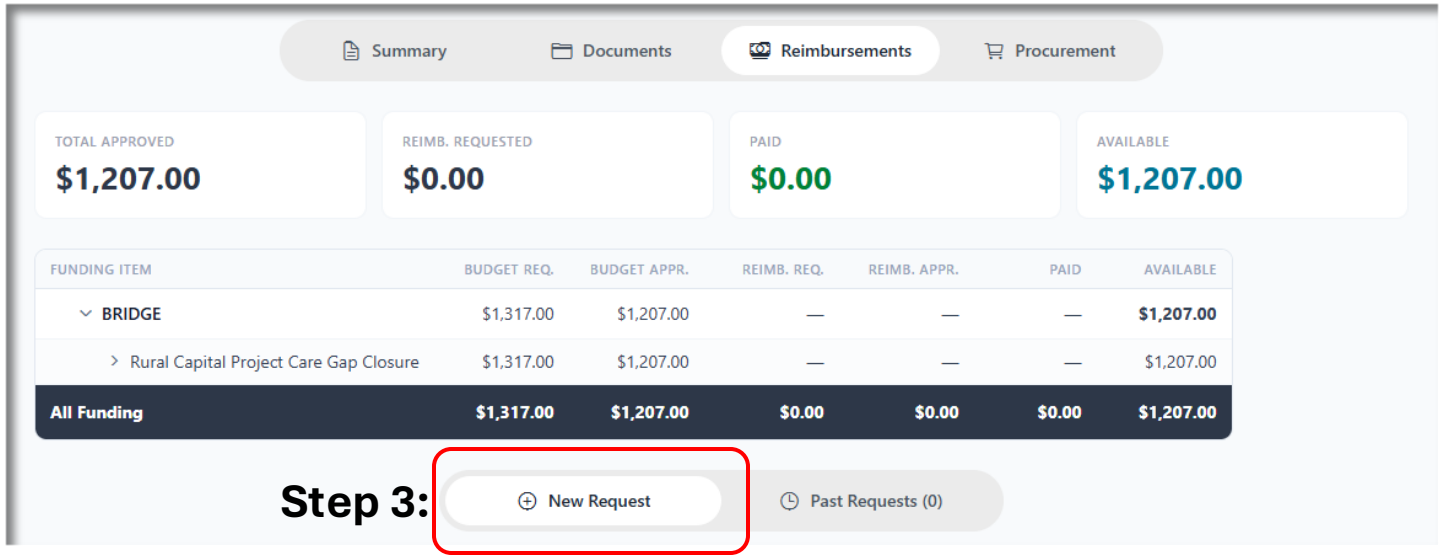
- **Step 2:**



Reimbursement Requests: *How to Submit?*

- From here, awardees will be able to view and manage the awarded application. The following sections are shown:
  - Total Approved
  - Reimbursement Requested
  - Paid
  - Available

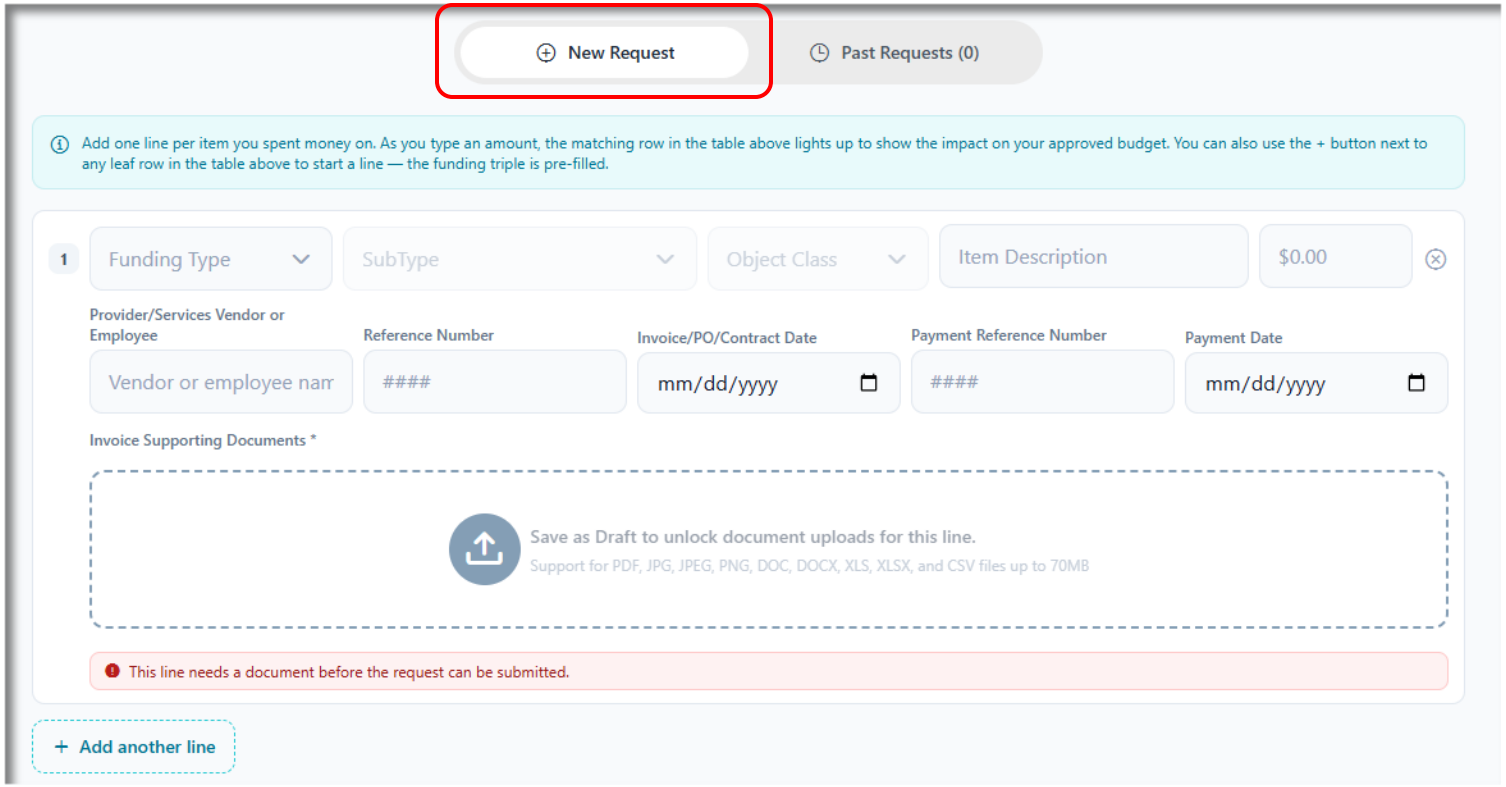
- The awardee will now need to select “New Request”



Reimbursement Requests: *How to Submit?*

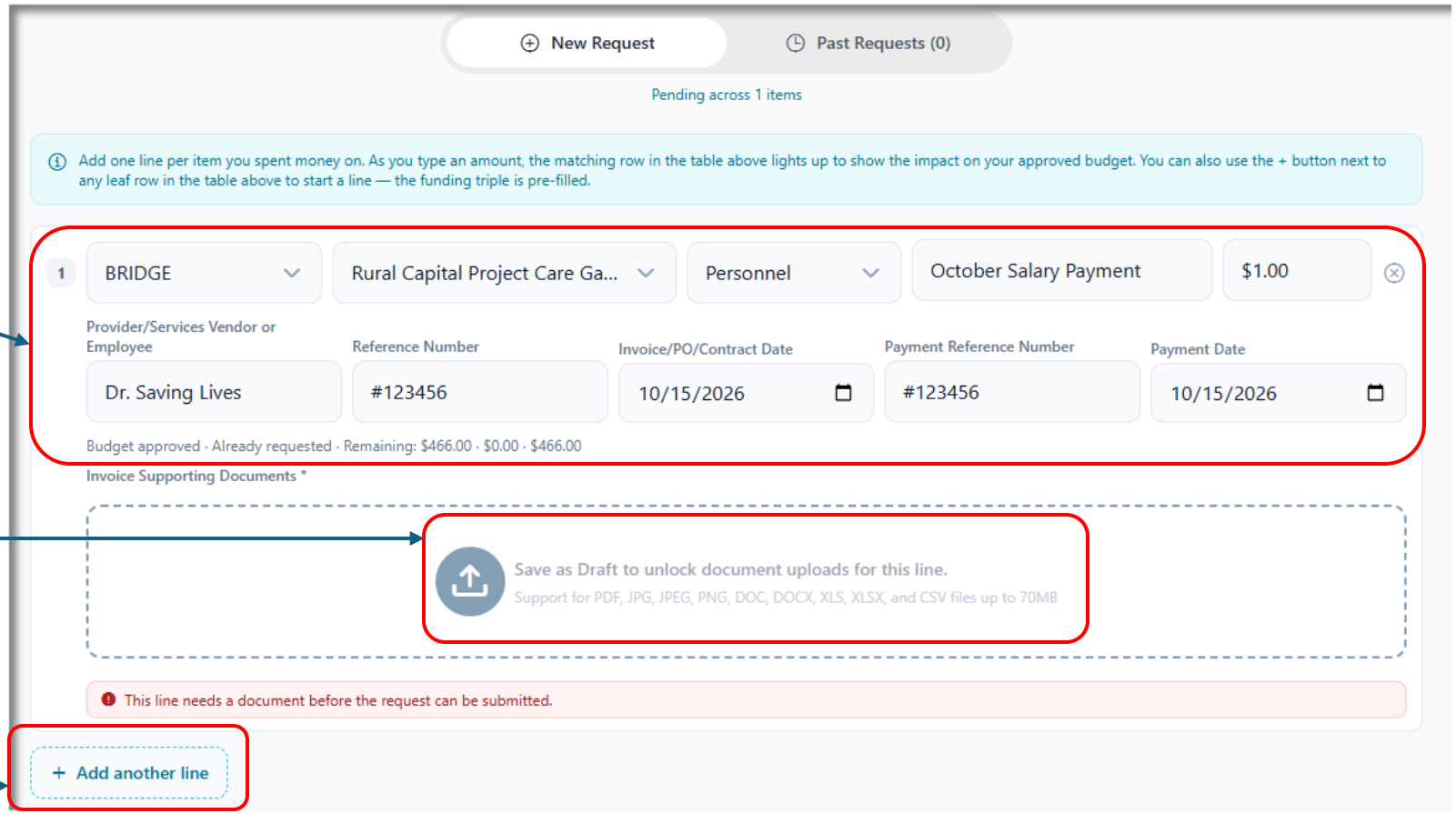
- The RFR submission table under “New Request” allows the awardee to enter the expenses associated with the reimbursement request.

Step 4:



Reimbursement Requests: *How to Submit?*

- Awardee will need to fill out the table (line) per item money was spent on.
- Add documentation here:
- Select “+ Add another line” to add additional line-item expenses.

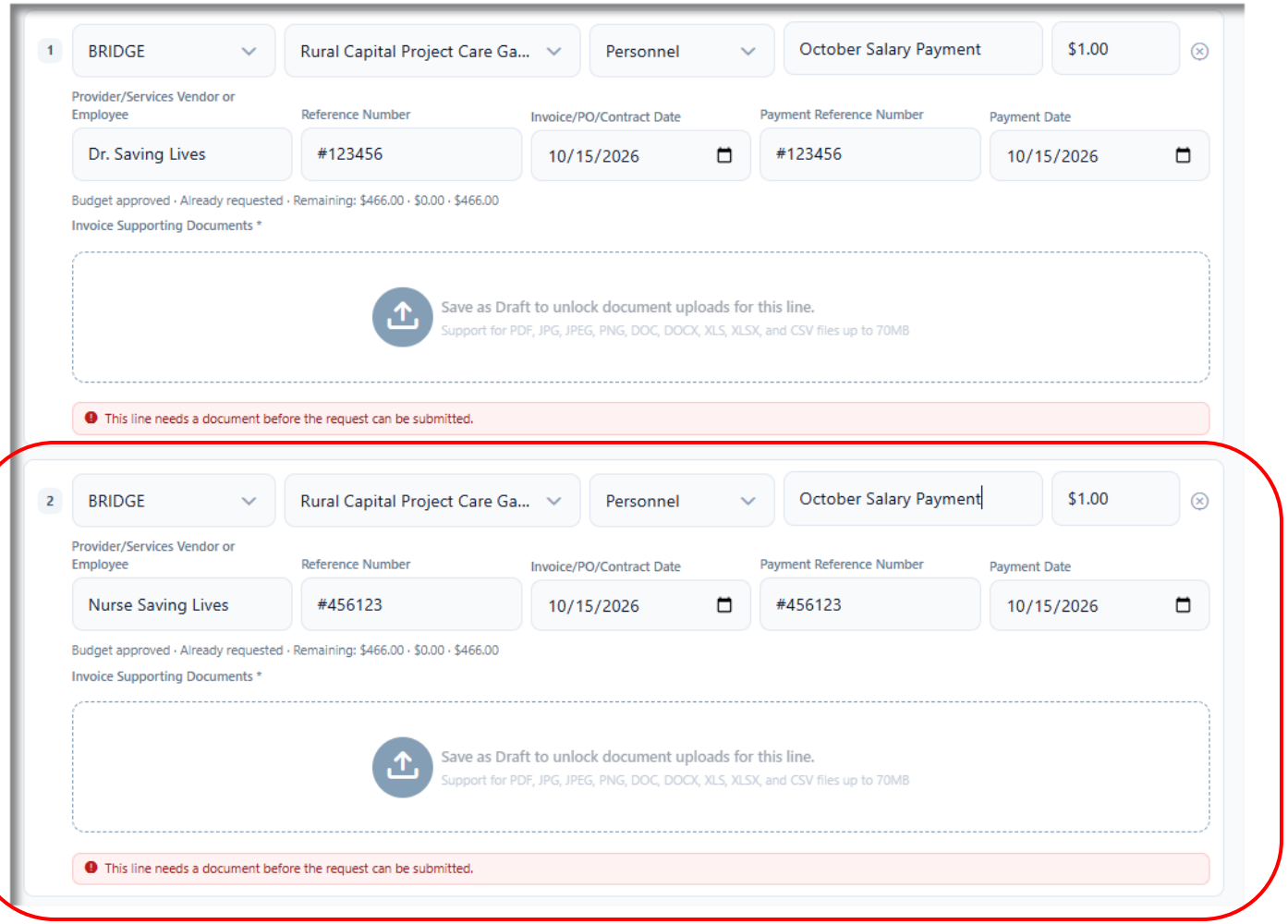


Reimbursement Requests: *How to Submit?*

- Second line-item expense:
  - Example using additional personnel.

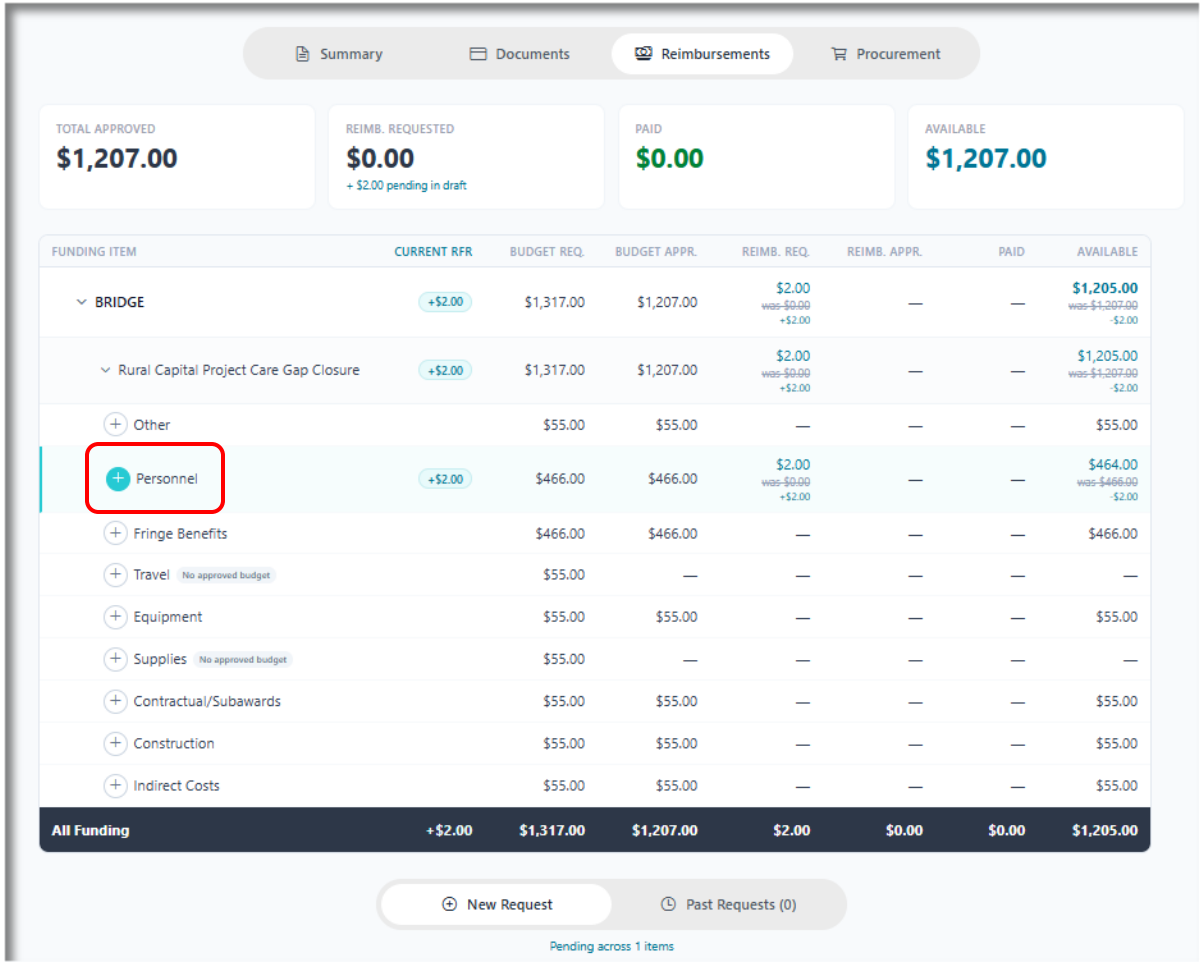
To restate:

The awardee must add one line per item money has been spent regardless of budget category.



Reimbursement Requests: *How to Submit?*

- As reimbursement line items are added, the table above will expand to show the application's budget breakdown.
- Here an awardee can select the "+" next to a budget category to add an additional line-item expense too.

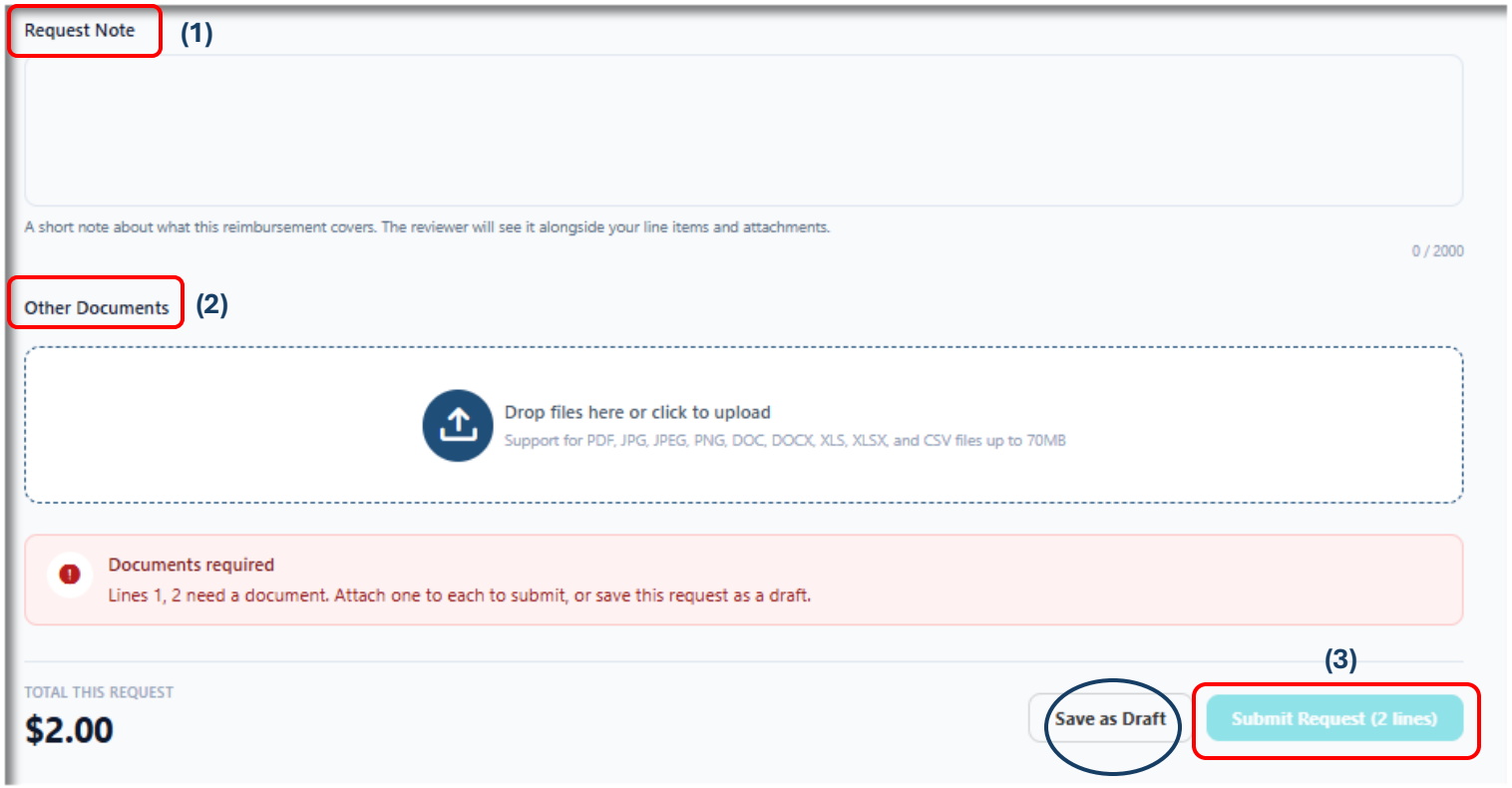


Reimbursement Requests: *How to Submit?*

- When all items associated with the RFR are complete, the awardee will:
    1. Leave a “Request Note”
    2. Upload any other supporting documents as necessary.
    3. Press “Submit Request” to begin review process.

- Additionally, the awardee may “Save as Draft” if additional changes may need to be made.

Step 5:



Reimbursement Portal Walkthrough Video

QUESTIONS?