

Completing the Federal Grant Questionnaire

Use this tutorial to complete the *Federal Grant Questionnaire*. This appears after submitting a purchase requisition that is over \$25,000 and uses a Federal grant.

<http://workday.miami.edu>

Overall Process - This pertains only to the requisition, questionnaire, and required approvals.

1. Create and submit a Purchase Requisition.
2. Complete and submit the *Federal Grant Questionnaire*.
3. The approval process will begin.

Create and Submit the Requisition – Create the requisition as usual. Consider the following tips.

TIPS:

DOLLAR AMOUNT

- Federal grant orders between \$25,000-\$75,000 require three quotes to be attached to the requisition.

ATTACHMENT TIPS

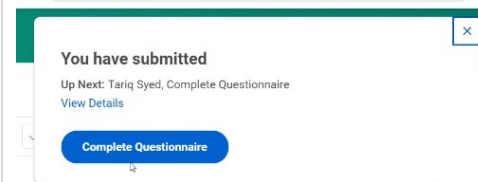
- For Federal Grants over \$25,000 sole source documentation does not need to be attached to the requisition. Instead, this information will be gathered in the questionnaire.
- If this is a sole source and the sponsor has expressly authorized a noncompetitive procurement response, then attach previously approved sponsor authorization.

SUBMITTING

- After the requisition is submitted the status will update to *In Progress* but will not route to the approval flow until the questionnaire has also been submitted.

Create and Submit the Federal Grant Questionnaire

Immediately after the requisition is submitted, click **Complete Questionnaire**.



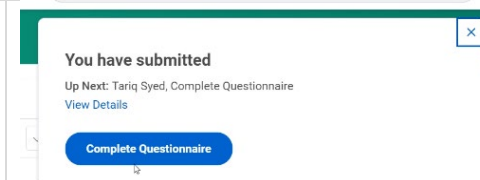
For the *Funding Source* field, select one of the following three options:

- The requisition is between \$25,000 - \$75,000 and has 3 quotes attached.
➡ From the three quotes attached to the requisition, list the three supplier names.
- The requisition is greater than \$75,000 and requires competitive bidding.
➡ List the RFQ/RFP number and the bidders that participated.
- This product/service is a sole source.
➡ If sole source is selected the following will appear:
The Uniform Guidance and University of Miami policy specifies that all purchases over \$25,000 are subject to competitive procurement processes. Exception to competitive procurement can only be awarded if one of the following circumstances apply, please select all that apply.
 - Available only from a single source.
 - Public urgency will not permit a delay resulting from publicizing a competitive solicitation.

- Sponsor has expressly authorized a noncompetitive procurement in response to written request. (Please attach sponsor authorization.)
 - After solicitation of competitive bid, competition is determined inadequate
1. **Purpose:** Provide a brief description of the intended application(s) for the items which are to be purchased as related to the award.
 2. **Justification:** Based on the sole source selection, please provide a detailed justification for the selected reason. The justification must address why this particular product or service is the only solution.
 3. **Efforts to identify other sources:** Describe efforts and market research conducted to identify other vendors to furnish the item(s) and, if applicable, why the other vendors would not qualify to submit a competitive proposal.
 4. **Reasonableness of price:** Select one or more of the following statements to indicate why you feel the accepted non-competitive price was fair and reasonable. Any selection requires explanation in the additional space provided below. Please select all that apply.
 - The quoted prices compare favorable to market prices, or to previous prices competitively obtained and found to be fair and reasonable, which were paid for the same or similar items. Please provide previous PO.
 - Price was obtained from a catalog or standard price list for items sold to the public. (Please include catalog or price list.)
 - The quoted prices compare favorable to market prices, or to previous prices competitively obtained and found to be fair and reasonable, which were paid for the same or similar items.
 - The vendor has certified that the prices offered are equal to or lower than those offered to any government agency or private institution for both like items/services and quantities. (Include published educational discounts).
 - Independent sources indicate that this price is reasonable (e.g., public contracts, Group Purchasing Organizations, Kelly Blue Book, Edmunds, consortium)
 - Other Reason(s)

Editing a Federal Grant Questionnaire

To edit or finish completing a *Federal Grant Questionnaire*, submit (or re-submit) the requisition. Then click **Complete Questionnaire**.



For questions, please contact PurchasingHelpDesk@miami.edu