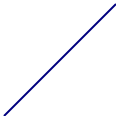

Walkthrough of System for Award Management (SAM)

USAID WEBINAR

Judith R. Zawatsky
Integrated Award Environment, GSA
April 15, 2015

A thin blue diagonal line starts from the bottom right corner of the slide and extends towards the center.

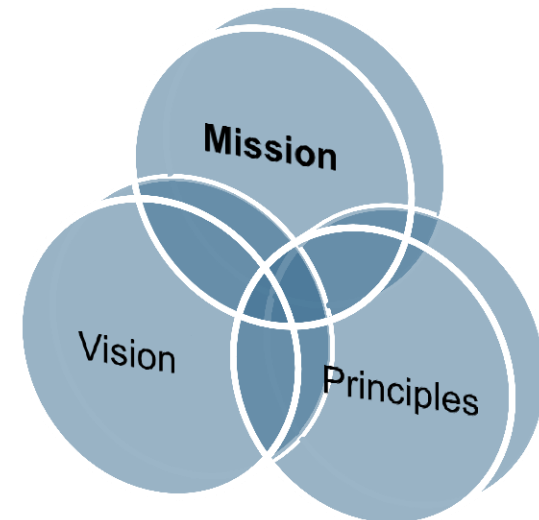
At the conclusion of the presentation you will be able to:

- Complete the NATO Commercial And Government Entity (NCAGE) enrollment steps to receive a NCAGE Code.
- Complete the SAM Registration process.
- Define the difference between an Individual and a System account
- Resolve questions about SAM by using the Help resources available in the application.
- Contact the Federal Service Desk when unable to resolve questions using Help resources in SAM.

At the conclusion of the presentation you will be able to:

- Resolve discrepancies between NCAGE and D&B legal business name.
- Explain the purpose of the DUNS +4 extension.
- Define the difference between Mandatory and Optional fields required for POC information

The IAE mission is to support a common, secure business environment which facilitates and supports cost-effective acquisition of, and payment for, goods and services; effective management of Federal acquisition and assistance awards; and consistent transparency into Federal acquisition and assistance awards.



The IAE vision is to continue to evolve and integrate the existing shared portfolio of ten electronic systems used for awarding and administering Federal financial assistance (i.e., grants, loans) and contracts.

The largest and most complex of the E-Government initiatives, the IAE works on behalf of the acquisition and financial assistance communities to save money, be more efficient, reduce burdens on the communities we serve, and improve Federal award management.



An online IT system that serves as the centralized and mandated point of registration for entities who wish to contract with or receive financial assistance from the U.S. Government

www.sam.gov



SAM is **FREE** for entities. The Federal Service Desk is the **FREE** Help Desk which serves users of SAM (as well as eSRS, FSRS, FBO, CFDA, and FPDS)

www.fsd.gov

Federal Service Desk	Contact FSD	News and Announcements
<p>Purpose</p> <p>The purpose of the Federal Service Desk (FSD.gov) is to help visitors get the information and assistance they need for the systems (websites) that the FSD supports.</p> <p>Supported Systems</p> <p>You may contact FSD for help with:</p> <ul style="list-style-type: none"> •System for Award Management (SAM) •Catalog of Federal Domestic Assistance (CFDA) •Electronic Subcontracting Reporting System (eSRS) •Federal Business Opportunities (FBO) 	<p>Hours of Operation</p> <p>Monday - Friday 8 a.m. to 8 p.m. ET</p> <p>U.S. Calls: 866-606-8220 International Calls: 334-206-7828 DSN: 866-606-8220</p> <p>Most users phone the Federal Service Desk, sometimes triggering longer wait times. You may receive quicker service by first searching for your answer or by contacting us via the "Submit a Question" web form</p>	<p>Tell us about your Experience or Ideas</p> <p>Your opinion is valued. Provide feedback about your experience or ideas.</p>

Hours of Operation
Monday - Friday 8 a.m. to 8 p.m. ET
U.S. Calls: 866-606-8220
International Calls: 334-206-7828

- Live Web Chat
- Webform
- Telephone
- Call Back

- Register as an entity
- Register as a government official

- Representations and Certifications

- Suspensions and Debarments (Exclusions)
 - Who must/should register ?
 - When should they register ?
 - How long is the registration good ?
 - Do I need to register to search ?

BEFORE YOU START

You will need the following information:

- 1 Your Data Universal Numbering System (DUNS) Number from Dun and Bradstreet and the name and address associated with that DUNS
- 2 Your Taxpayer Identification Number and the name associated with that TIN (from your W-2)
- 3 Your Contractor and Government Entity (CAGE) Code, if you already have one (if you don't, one will be assigned to you during registration)
- 4 Your Electronic Funds Transfer information such as your ABA Routing Number and your account number

CANCEL

CONTINUE

Register Entity

▶ [Registration Overview](#)

▼ [Purpose of Registration](#)

→ [Determine Purpose](#)

● [Confirm](#)

▶ [Core Data](#)

▶ [Assertions](#)

▶ [Representations and Certifications](#)

▶ [Points of Contact](#)

▶ [Submit Certification](#)

[Back to Manage Entity](#)

Determine Purpose of Registration

Page Description

The system will guide you through the entity registration process based on the answers you provide below.

What type of entity are you? *

Please select a value ▼

Do you wish to bid on contracts?

Not Applicable ▼

Do you want to be eligible for grants and other federal assistance?

Not Applicable ▼

Do you want to perform Intragovernmental Transactions (IGT)?

Not Applicable ▼

[Cancel](#)

[Back](#)

[Next](#)

- Business or Organization ▼
- Please select a value
- Business or Organization
- US Federal Government
- US State Government
- US Local Government
- Tribal Government
- Foreign Government

Register Entity

Registration Overview

Purpose of Registration

Core Data

- DUNS Information
- Verify DUNS Information**
- Business Information
- IRS Consent
- CAGE or NCAGE Code
- General Information
- Financial Information
- Executive Compensation Questions
- Proceedings Questions
- Information Opt-Out
- Review Core Data
- Continue to Next Section

Assertions

Representations and Certifications

Points of Contact

Submit Certification

Verify DUNS Information

GORMAN MANUFACTURING COM..

DUNS: 804735132

Page Description

Please review the information retrieved from Dun & Bradstreet (D&B) for accuracy. If you click "Save & Continue," the information from D&B will appear in your entity's registration. If the information returned is incorrect, please click "Cancel" and make the necessary updates in D&B.

Details Entered by the user

DUNS: 804735132

Name:

Legal Business Name: Gorman Manufacturing

Address:

Address Line: 492 Koller Street

City: San Francisco

State: CA

ZIP/Postal 94110

Code:

Country: UNITED STATES

Details returned from D&B

DUNS: 804735132

Name:

Legal Business Name: GORMAN

 MANUFACTURING
 COMPANY, INC.
Address:

Address Line: 492 KOLLER STREET

City: SAN FRANCISCO


State: CA

ZIP/Postal 94110

Code:

Country: UNITED STATES

Content Glossary

Core Data: 

DUNS/DoDAAC:

Name:

Address:

BACK TO USER DASHBOARD

CANCEL

PREVIOUS

SAVE AND CONTINUE

Registration Overview

Welcome, testaccount0005 testaccount0005

SAM Entity Management registrants are required to submit detailed information on their entity in the following categories, depending on the purpose of the registration:



Core Data

Mandatory for all registration types. Includes, but is not limited to, an entity's DUNS and/or DoDAAC, name, address, CAGE or NCAGE, code, TIN or EIN number, general information, financial information, and details about any proceedings in which the entity may currently be involved.



Assertions

Documents self-assertions from each entity. Includes, but is not limited to, data about the types of goods and services the entity provides, the entity size, optional Electronic Data Interchange (EDI), and disaster relief data.





Representations & Certifications

Documents an entity's representations and certifications related to their small business status, responses to commonly used Federal Acquisition Regulation (FAR) and Defense Federal Acquisition Regulation Supplement (DFARS) provisions/clauses, and Architect-Engineer Responses (SF330 Part II).



Points of Contact

Mandatory for all registration types. The entity will be asked to provide contact information for any mandatory POC based on the information they provided during the registration process. Includes, but is not limited to, accounts receivable, electronic business, and government business.

[START REGISTRATION](#)

- Users are required to submit a NCAGE Code or a CAGE Code in SAM to register their entity.
- NCAGE and CAGE Codes are unique identifiers for entities that do business with and/or seek financial assistance from the U.S. federal government.
- The following table explains the differences between a NCAGE Code and a CAGE Code:

	NCAGE Code	CAGE Code
Location of Entities	Entities located outside the U.S. and its outlying areas*.	Entities located in the U.S. and its outlying areas*.
Assigned By	NATO Support Agency (NSPA)	Defense Logistics Agency (DLA) Contractor and Government Entity (CAGE) Branch
Portal for Assignment	NSPA ePortal	SAM

* Puerto Rico, Guam, U.S. Virgin Islands, American Samoa, Northern Mariana Islands, Midway Islands, Wake Island, Johnston Atoll, Baker, Howland, and Jarvis Islands, Kingman Reef, Navassa Island, and Palmyra Atoll

GSA NCAGE and CAGE Code Assignments



To receive and report your entity's NCAGE Code, please visit the NSPA ePortal Page: <https://eportal.nspa.nato.int/AC135Public/scage/CageList.aspx>

The screenshot shows the NSPA NATO Codification Tools website. The header includes the NATO Codification Tools logo and the NSPA NATO Support Agency logo. The navigation menu contains links for NMCRL-WEB, NMCRL-DVD, CAGE/NCAGE Code Request, and ACodP2/3. The main content area features a search criteria form with the following fields:

- CAGE/NCAGE Code
- Organization Name
- Country
- City
- Postal Code
- Phone Number
- Identification Number (IDN)

A blue circle highlights the word "link" in the introductory text, and a blue arrow points from this circle to the explanatory text at the bottom of the slide.

Click here to review instructions on how to receive and report your entity's NCAGE Code in SAM.

- After obtaining a NCAGE/CAGE Code, Non-US Business/Organizations wishing to do business (contracts/grants) with U.S. Government must:
 1. Confirm that the NCB or NSPA has submitted your correct legal business name and/or physical address to the U.S. CAGE System by going to the Business Identification Number Cross Reference System (BINCS) and enter your NCAGE/CAGE code and click Search.
 2. BINCS is a public facing search engine for domestic and foreign vendors, suppliers and potential contractors supporting the U.S. federal supply chain and should be used to verify the registration information.
 3. BINCS is updated within 24-48 hours after U.S. CAGE System has processed the updates to the NCAGE/CAGE registration.
 4. Verify the information at:
https://www.logisticsinformationservice.dla.mil/BINCS/begin_search.aspx

- How can I resolve a difference between the legal business name in DUNS and the NCAGE database.
 - 1) The name must match exactly, any difference will result in an error. This includes spaces, dashes, etc. **Bassin-Bleu Inc.** and **Bassin Bleu Inc.** are not the same company, the dash (-) needs to be included.
 - 2) The DUNS Number links to the corresponding NCAGE Code.
 - 3) If the discrepancy is with NCAGE database
 - Contact the following address at ncage@nspa.nato.int
 - Contact Mr. Patrice Verlaine at 352 3063 6145 or your POC .
 - 4) If the discrepancy is with Dunn & Bradstreet database
 - Use the online webform <http://fedgov.dnb.com/webform>

Figure 3.12: CAGE Code


Page Description
Please enter your CAGE below. If you do not have an existing CAGE Code, one will be assigned during the processing of your registration.

Does your entity already have a CAGE Code? *

CAGE :

[Search CAGE Code](#)

Figure 3.14: Incorrect CAGE Code Error

The CAGE Code entered could not be found. Options: Correct the CAGE Code, or remove the CAGE Code and select "No" for "Does your entity already have a CAGE Code?". If you believe that the CAGE Code you entered is correct, contact the Federal Service Desk US Only at 866-606-8220,  internationally at 334-206-7828.
Note: User can NOT save the page with an invalid CAGE Code.

View assistance for SAM.gov



USER NAME

PASSWORD

LOG IN

[Forgot Username?](#)[Forgot Password?](#)[Create an Account](#)

HOME

SEARCH RECORDS

DATA ACCESS

GENERAL INFO

HELP

CREATE USER ACCOUNT

Your CCR username will not work in SAM. You will need a new SAM User Account to register or update your entity records. You will also need to create a SAM User Account if you are a government official and need to create Exclusions or search for FOUO information.

[Create User Account](#)

REGISTER/UPDATE ENTITY

You can register your Entity (business, individual, or government agency) to do business with the Federal Government. If you are interested in registering or updating your Entity, you must first create a user account.

[Register/Update Entity](#)**New!** Use the SAM Status Tracker to: [Check Status](#)

SEARCH RECORDS

All entity records from CCR/FedReg and ORCA and exclusion records from EPLS, active or expired, were moved to SAM. You can search these records and new ones created in SAM. If you are a government user logged in with your SAM user account, you will automatically have access to FOUO information.

[Search Records](#)

WHAT IS SAM?

[Need Help?](#)

The **System for Award Management (SAM)** is the Official U.S. Government system that consolidated the capabilities of CCR/FedReg, ORCA, and EPLS. There is **NO** fee to register for this site. Entities may register at no cost directly from this page. User guides and webinars are available under the Help tab.

NEWS AND ANNOUNCEMENTS

Try out SAM's new RESTful API for public registration data! [Learn more](#).

Update: The SAM.gov January 16, 2015 [release notes](#) are posted. Remember, you can find release notes for all SAM.gov software releases at SAM.gov > General Info > News > Release Notes.

USER GUIDES/HELPFUL HINTS

Additional information, such as a full User Guide, Quick Start Guides, Helpful Hints, and Webinars are available on the HELP tab.

Service Desk

URL: <http://www.FSD.gov>

[Learn](#) how to check your SAM entity registration status.

ATTENTION EXTRACT AND WEB SERVICE USERS

Support for the legacy-formatted extracts and web services in SAM ended on October 31st, 2014. Federal systems using SAM data must convert to the SAM-formatted extracts and web services. If you see "You do not have access to this extract" you need to submit a Data Access Request for the appropriate role by logging in with the account that needs the role. Go to "Data Access" then click on either "System Data Access Request" or "Individual Data Access Request" (depending on your user account type) and follow the prompts to submit the request.

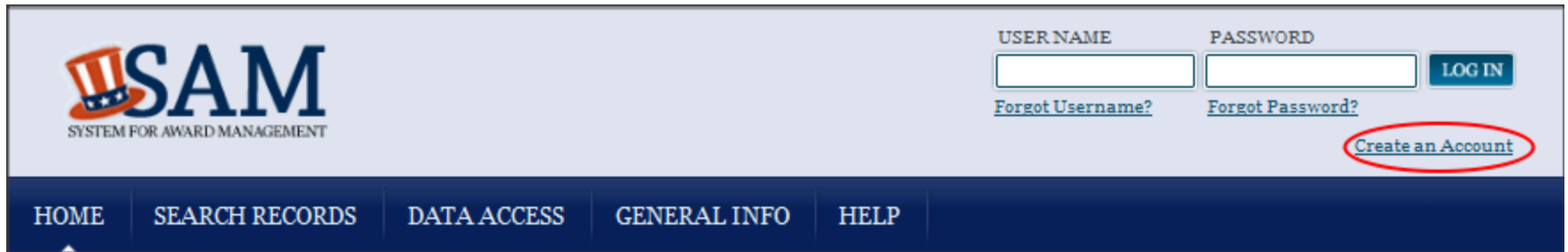
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WWW6

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SAM
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USER NAME PASSWORD

[Forgot Username?](#) [Forgot Password?](#)

[Create an Account](#)

HOME SEARCH RECORDS DATA ACCESS GENERAL INFO HELP

CREATE USER ACCOUNT

Your CCR username will not work in SAM. You will need a new SAM User Account to register or update your entity records. You will also need to create a SAM User Account if you are a government official and need to create Exclusions or search for FOUO information.


Create User Account

Individual vs System accounts

Username

Passwords

Forced expirations



SYSTEM FOR AWARD MANAGEMENT

[Forgot Username?](#) [Forgot Password?](#)

[Create an Account](#)

[HOME](#) | [SEARCH RECORDS](#) | [DATA ACCESS](#) | [GENERAL INFO](#) | [HELP](#)

Create an Account

Choose Account Type

Individual Account Details

Create an Individual User Account

- * To perform tasks such as register/update your entity (legacy CCR/FedReg and ORCA functionality).
- * To create and manage exclusion records (legacy EPLS functionality).
- * To view FOUO level data for entity management registration records and exclusion records (Same as government user CCR Tools functionality).

System Account Details




Create a System User Account

- * If you need system-to-system communication or you are automating your system pull of the data.
- * If you are performing data transfer from SAM to your government database system.

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USER NAME: PASSWORD: [LOG IN](#)
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HOME SEARCH RECORDS DATA ACCESS GENERAL INFO HELP

Create Account: Individual

Your Account Information
Create your individual user account in SAM by entering the following information.

▶ [Personal Information](#)
▶ [Summary](#)

First Name: *

Last Name: *

Email Address: *

Confirm Email Address: *

Phone: *

Primary Communication: Phone Email

Additional Comments:

Country: *

Username must be at least six characters in length.
Warning: Once created, username cannot be changed in SAM.

Username: *

Password must be at least 8 characters in length and contain at least one number, one letter, and one special character.

Password: *

Confirm Password: *

Security Question 1: *

Security Answer 1: *

Security Question 2: *

Security Answer 2: *

Security Question 3: *

Security Answer 3: *



SAM
SYSTEM FOR AWARD MANAGEMENT

USER NAME: TGillette
PASSWORD: ●●●●●●

[Forgot Username?](#) [Forgot Password?](#) **LOG IN** [Create an Account](#)

HOME SEARCH RECORDS DATA ACCESS GENERAL INFO HELP

CREATE USER ACCOUNT

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[Create User Account](#)

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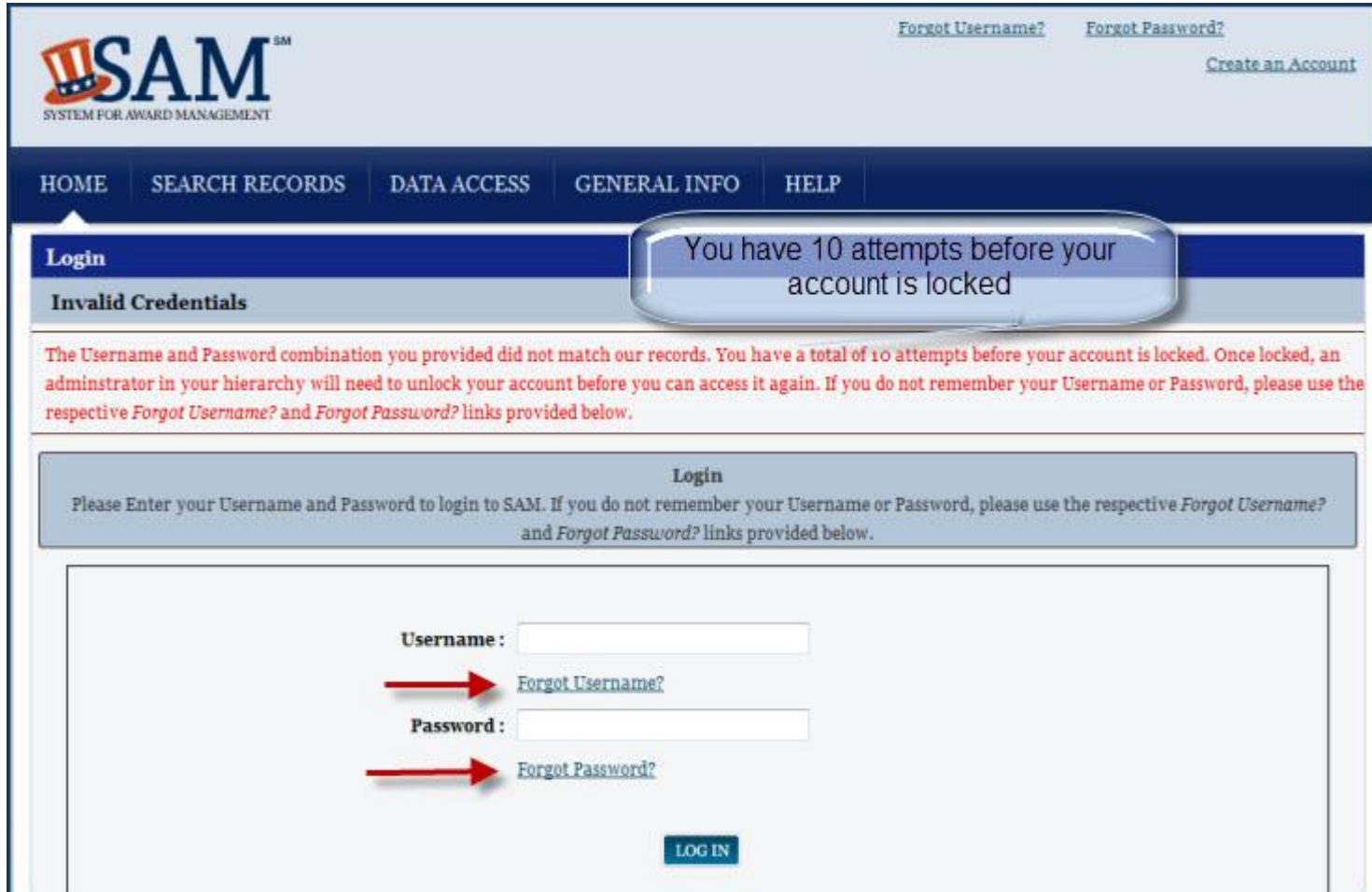
[Register/Update Entity](#)

New! Use the SAM Status Tracker to: [Check Status](#)

SEARCH RECORDS

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[Search Records](#)



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HOME SEARCH RECORDS DATA ACCESS GENERAL INFO HELP

Login

Invalid Credentials

You have 10 attempts before your account is locked

The Username and Password combination you provided did not match our records. You have a total of 10 attempts before your account is locked. Once locked, an administrator in your hierarchy will need to unlock your account before you can access it again. If you do not remember your Username or Password, please use the respective [Forgot Username?](#) and [Forgot Password?](#) links provided below.

Login

Please Enter your Username and Password to login to SAM. If you do not remember your Username or Password, please use the respective [Forgot Username?](#) and [Forgot Password?](#) links provided below.

Username :


[Forgot Username?](#)

Password :

[Forgot Password?](#)

LOG IN

View assistance for Search Records



SAMSM
SYSTEM FOR AWARD MANAGEMENT

USER NAME PASSWORD

[Forgot Username?](#) [Forgot Password?](#)

[Create an Account](#)

HOME SEARCH RECORDS DATA ACCESS GENERAL INFO HELP

Search Records

Looking for entity registration records or entity exclusion records in SAM?

- * Use **Quick Search** if you know an entity's Business Name, DUNS number or CAGE code.
- * Use **Advanced Search** to structure your search using multiple categories and criteria.

Are you a Federal government employee?

- * Create a SAM user account with your government e-mail address and log into SAM before searching to see FOUO information and registrants who chose to opt out of the public search.

Conducting small business-focused market research?

- * In addition to what is contained in SAM, small businesses may supplement information about themselves in the SBA's [Dynamic Small Business Search](#).

QUICK SEARCH:

(Example of search term includes the entity's name, etc.)

DUNS Number Search:




CAGE Code Search:

ADVANCED SEARCH: Use specific criteria in multiple categories to structure your search.

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WWW2

USER NAME: PASSWORD: [LOG IN](#)

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Extracts and Data Access

Public Extracts

EM Extracts

Exclusion Interfaces

General Data Access Information

Interface and Data Access Information

Public Access Data


Public Data Access

This page provides details for accessing public data. Click on the **Data Package Name** below for more information.

ENTITY MANAGEMENT EXTRACTS PUBLIC DATA PACKAGE	Data Package Information
<p>Data Access Role: Public</p> <p>Format: Pipe-Delimited</p> <p>Description: This data package will contain entity registration data publicly available under the Freedom of Information Act (FOIA) for those registered in SAM to do business with the Federal government. Beginning in 2014, it will be available in the new SAM format. No special data access will be needed to download this file.</p> <p>Daily Files - Current month</p> <p>ASCH DATA Tue 3rd Wed 4th Thu 5th Fri 6th Sat 7th Tue 10th Wed 11th Thu 12th Fri 13rd Sat 14th Tue 17th Wed 18th Thu 19th Fri 20th Sat 21st Tue 24th Wed 25th Thu 26th Fri 27th Sat 28th Tue 3rd </p> <p>UTF-8 DATA</p>	<p>Descriptions</p> <p>Sample Daily File</p> <p>Sample Monthly Refresh File</p> <p>Data File Layout</p> <p>Monthly File</p> <p>March 2015</p> <p>*1 Feb 2015</p> <p>*1 Mar 2015</p>
LEGACY CCR EXTRACTS PUBLIC ("FOIA") DATA PACKAGE	Data Package Information
<p>Data Access Role: Public</p> <p>Format: CSV</p> <p>Description: This data package contains entity registration data publicly available under the Freedom of Information Act (FOIA) for those registered in SAM to do business with the Federal government. The file is updated monthly and posted in the same format as the legacy CCR FOIA extract. No special data access is needed to download this file.</p> <p>Monthly File</p>	<p>File Layout</p>
EXCLUSIONS EXTRACT DATA PACKAGE	Data Package Information
<p>Data Access Role: Public</p> <p>Format: CSV</p> <p>Description: This data package contains the publicly available data for all active exclusion records entered by the Federal government identifying those parties excluded from receiving Federal contracts, certain subcontracts, and certain types of Federal financial and non-financial assistance and benefits. Users must read the exclusion record completely to understand how it impacts the excluded party. No special data access is needed to download this file.</p> <p>Warning: Older versions of Microsoft Excel cannot load more than 65,536 rows from a CSV file. If you have Microsoft Excel version 2007 or higher, you should be able to load the complete file. If you encounter this limitation, and do not need the complete file, you can use SAM's Search functionality to filter to a smaller subset of data and export the results.</p> <p>Complete file - Last 7 days</p> <p>Tue 24th Wed 25th Thu 26th Fri 27th Sat 28th Tue 3rd </p>	<p>Descriptions</p>

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SAMSM
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General Information

About SAM

- [What is SAM?](#)
- [Disclaimers](#)
- [Accessibility](#)
- [Privacy Policy](#)

[News](#)

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About SAM

What is SAM?

The System for Award Management (SAM) is combining federal procurement systems and the Catalog of Federal Domestic Assistance into one new system. This consolidation is being done in phases. The first phase of SAM includes the functionality from the following systems:

- * Central Contractor Registry (CCR)
- * Federal Agency Registration (Fedreg)
- * Online Representations and Certifications Application
- * Excluded Parties List System (EPLS)

How will SAM benefit me?

The overarching benefits of SAM include streamlined and integrated processes, elimination of data redundancies, and reduced costs while providing improved capability.

SAM | System for Award Management 1.0

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WWW1

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USER NAME

PASSWORD

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Help

SAM User Help

FAQs

FAQs

General FAQs

User Guides

Demonstration Videos

Exclusions Information

Frequently Asked Questions (FAQs)

This page provides answers to the most frequently asked SAM questions. You can perform a search for a question or filter the questions to a functional area. Please visit the Federal Service Desk (FSD) website for more help with SAM and other GSA IAE systems: www.fsd.gov

Search

- [Who do I contact with additional questions on TIN \(Taxpayer Identification Number\) validation?](#)
Answer : If you are having problems with TIN mismatches in SAM concerning your Employer Identification Number, please contact the IRS at [1-800-829-4933](tel:1-800-829-4933) FREE. If you are having problems with T...
- [I manage multiple entity registrations in SAM. Can I link all my DUNS numbers to my user account?](#)
Answer : Yes. You only need one account to manage all of your SAM entity registrations. If a DUNS record is not already registered in SAM, select Register New Entity from the left navigation ...
- [I want to assign my claims to another source. How do I do that?](#)
Answer : The standard procedure is if a contractor assigns his or her payments, the contract needs to be modified to identify the assignee. That identification needs to include the assignee's DUNS ...
- [Do I need to fill out the Disaster Relief Contractor Data Elements?](#)
Answer : This section is optional for those contractors wishing to do business with the federal government, such as the Federal Emergency Management Agency (FEMA), in the event of a natural disaster...
- [Which systems does the Federal Service Desk \(FSD\) support?](#)
Answer : The U.S. General Services Administration operates and maintains the governmentwide systems supported by the Federal Service Desk. These systems include the Catalog of Federal Domestic Assi...
- [If I only want to submit the SF 330 Part II in SAM, do I have to answer all of the other question...](#)
Answer : Yes, you must answer all the questions in order to provide any SF330 Part II information.
- [How do I certify to the DFARS provisions in SAM?](#)
Answer : In order to certify to the provisions related to the DFARS, you must first answer yes to question 28 of the SAM Questionnaire. The SAM Questionnaire will then display the DFARS related que...
- [I am not ready to submit my exclusion record and want to save a draft. How can I do that?](#)
Answer : You are not able to save a draft version of an exclusion record. An exclusion will only be saved in the system when you complete all of the steps and submit it. However, if you are not rea...
- [How do I validate the CAGE Code of the entity's Immediate Owner and/or Highest-Level Owner?](#)
Answer : Please refer to Subpart 4.18 in the Federal Acquisition Regulation for guidance. FAR 52.204-17 is a self-certification by the offeror.
- [What is a Commercial and Government Entity \(CAGE\) Code?](#)
Answer : A CAGE Code is a unique identifier assigned by the Defense Logistics Agency (DLA) to all commercial or government entities located in the United States or its outlying areas. DLA's Co...

[More Results](#)


SAM | System for Award Management 1.0

IBM v1.P.24.20150116-1831

WWW1

Note to all Users: This is a Federal Government computer system.
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SAM
SYSTEM FOR AWARD MANAGEMENT

USER NAME: PASSWORD: [LOG IN](#)

[Forgot Username?](#) [Forgot Password?](#) [Create an Account](#)

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Help

FAQs

User Guides

Demonstration Videos

Exclusions Information


SAM User Help

Demonstration Videos

Demonstration Videos

The following videos will help familiarize you with the features and functionalities of SAM. Click on a video to launch the video in a new window. Adobe Flash Player is required.


SAM Overview Video



Description: New to SAM? This video will introduce you to SAM and how it fits into GSA IAE suite of systems.

[VIEW TRANSCRIPT](#)


Register a New Entity in SAM to be Eligible for Government Contracts



Description: Learn how to create an Entity Management registration so that your entity is eligible for Government contracts.

[VIEW TRANSCRIPT](#)


Register a New Entity in SAM to be Eligible for Grants and Other Federal Assistance



Description: Register a New Entity in SAM to be Eligible for Grants and Other Federal Assistance.

[VIEW TRANSCRIPT](#)


Migrating Your Legacy System Roles



Description: Learn how to migrate your permissions from your legacy system account to your new SAM account.

[VIEW TRANSCRIPT](#)


Managing Users as an Administrator



Description: This webinar explains what you can do as an administrator for your entity. Learn how to manage who has roles with your entity. This includes sending invitations, approving role requests, and adding/removing users role.

[VIEW TRANSCRIPT](#)

SAM Webinar for Government Users




Description: This webinar explains what you can do as a federal government user of SAM.

[VIEW TRANSCRIPT](#)

SAM | System for Award Management 1.0

Note to all Users: This is a Federal Government computer system. Use of this system constitutes consent to monitoring at all times.

IBM v1.P.24.20150116-1831
WWW1

MY SAM

[Manage My User Roles](#)[Manage Entity Users](#)[Register/Update Entity](#)[Manage Exclusions](#)[Account Settings](#)[Data Access](#)[General](#)

Welcome, testaccount0005 testaccount0005

Welcome to SAM! From here you can access the functionality that you need to do your job.

The navigation links on the left side of your page give you access to different parts of SAM. The categories available vary based on your permissions in SAM. For example:



Manage My User Roles

Links here allow you to manage your roles. You can request new roles or view your current roles and entity associations.



Register/Update Entity

Here you will find links to manage your entity registration record(s). If you are updating an entity registration for the first time in SAM, this information came from CCR, ORCA, or FedReg.



Data Access

If you need access to data extracts or need to view non-public data (such as TIN or banking information) through search, this section will contain all the information you need to request permission.

If you have any questions, click the **Help** tab for training materials, FAQs, and contact information for the supporting SAM Help Desk.

Migrate Legacy Account

- Select Legacy Systems
- Select Legacy Accounts
- Summary

[BACK TO USER DASHBOARD](#)

Select Legacy Accounts

Select Legacy Accounts

If a match was found for a system, please select to migrate the matching result. If no results were found, please enter a different email address to perform another search. If additional information is required, you will be prompted for your legacy system account username.

CCR
Enter Email Address:

[PREVIOUS](#) [NEXT](#)

Oh no! I do not know the CCR email address!!! What now??

- Automated Tool: DUNS number, TIN, ABA Routing Number, and Bank Account Number
- Help Desk – certified letter

Note: TIN (either EIN or SSN) is required. Only sole proprietors without a TIN should enter an SSN. Please note that the number entered here will be sent to the IRS with the TIN consent information below. It may take 3-5 days to return a TIN match from IRS.

Business Information:

Business Start Date

(MM/DD/YYYY): *

Fiscal Year End Close Date

(MM/DD): *

Company Division Name:

Company Division Number:

Corporate URL:

Congressional District

Create/Enter MPIN: *

The MPIN will serve as your signature to release the TIN consent form.

The MPIN will be shared with authorized partner applications (e.g. Grants.gov, Past Performance Information Retrieval System (PPIRS) etc.). The MPIN acts as your password in these systems and you should guard it as such. The MPIN must be nine characters long and contain at least one letter, one number, and no spaces or special characters.

▼ Physical Address - CHESAPEAKE

<p>Register Entity</p> <p>Registration Overview</p> <p>Purpose of Registration</p> <p>Core Data</p> <ul style="list-style-type: none"> ● DUNS Information ✓ Verify DUNS Information ✓ Business Information ✓ IRS Consent ● CAGE or NCAGE Code ● General Information ● Financial Information ✓ Executive Compensation Questions ✓ Proceedings Questions ✓ Information Opt-Out ● Review Core Data ● Continue to Next Section <p>Assertions</p> <p>Representations and Certifications</p>	<p>IRS Consent SOLAR EDISON, LLC</p> <p style="text-align: right; font-size: small;">DUNS: 002806004 CAGE Code: 09881</p>	<p>Content Glossary</p> <p>TIN Consent: <input type="checkbox"/> <input type="checkbox"/></p>
<p>CONSENT TO DISCLOSURE OF TAX INFORMATION</p>		
<p>I hereby authorize the Internal Revenue Service (IRS) to validate that the legal Business Name and the Taxpayer Identification Number (TIN) (Employer Identification Number or Social Security Number) provided by the registrant matches or does not match the name and/or name control and TIN in the files of the IRS for the most current tax year reported.</p> <p>Pursuant to 26 U.S.C. 6103(c), I hereby authorize the Internal Revenue Service (IRS) to disclose to the officers and employees of the System for Award Management (SAM) Program Office whether the name and/or name control and TIN provided in connection with this registration is the TIN maintained in IRS files for SOLAR EDISON, LLC for the most current tax year reported. I recognize that this validated TIN will reside on SAM and will be accessible to Federal Government procurement officials and other Government personnel performing managerial review and oversight, for use in all Governmental business activities including tax reporting requirements and debt collection.</p> <p>For questions about your EIN, please call the IRS at 1-866-255-0654. For questions about your SSN, please call the Social Security Administration at 1-800-772-1213. In addition by providing the following information, I certify that I have the authority to execute this consent for the disclosure of this return information on behalf of the registrant.</p> <p>Upon completion of this page all information required to perform the TIN match will be sent to IRS. Please confirm all information is accurate before proceeding as it will not be editable.</p> <p>TIN Consent:</p> <p>Note: The TIN will not be validated unless the Taxpayer Name is an exact match of the name that the IRS has on file for your entity according to its most recent tax return. Please note that this may be different than the Legal Business Name. When you enter your Taxpayer Name, only use letters, numbers, spaces, hyphens (-) and ampersands (&); omit any other special characters that are part of the business name.</p> <p>Tax Payer Name*: <input style="width: 100px;" type="text"/></p> <p>Taxpayer Identification Number(TIN): <input style="width: 100px;" type="text" value="123412312"/></p>		

Page Description

Please enter the requested information below about your entity. You must provide data for the five (5) most highly compensated executives in your business or organization including parent organization.

Executive Compensation:

In your business or organization's preceding completed fiscal year, did your business or organization (the legal entity to which this specific SAM record, represented by a DUNS number, belongs) receive both of the following: *

1. 80 percent or more of your annual gross revenues in U.S. federal contracts, subcontracts, loans, grants, subgrants, and/or cooperative agreements and
2. \$25,000,000 or more in annual gross revenues from U.S. federal contracts, subcontracts, loans, grants, subgrants, and/or cooperative agreements?

No

Does the public have access to information about the compensation of the senior executives in your business or organization (the legal entity to which this specific SAM record, represented by a DUNS number, belongs) through periodic reports filed under section 13(a) or 15(d) of the Securities Exchange Act of 1934 (15 U.S.C. 78m(a), 78o(d)) or section 6104 of the Internal Revenue Code of 1986?

Not Applicable

CANCEL

PREVIOUS

SAVE AND CONTINUE

Proceedings:

Is there a Federal solicitation on which your business or organization, as represented by the DUNS number on this specific SAM record, is bidding that contains the FAR provision 52.209-7, or has your business or organization, as represented by the DUNS number on this specific SAM record, been awarded a Federal contract that contains FAR clause 52.209-8? *

Please select a value ▼

Does your business or organization, as represented by the DUNS number on this specific SAM record, have current active Federal contracts and/or grants with total value (including any exercised/unexercised options) greater than \$10,000,000?

Not Applicable ▼

Within the last five years, had the business or organization (represented by the DUNS number on this specific SAM record) and/or any of its principals, in connection with the award to or performance by the business or organization of a Federal contract or grant, been the subject of a Federal or State

1. Criminal proceeding resulting in a conviction or other acknowledgment of fault;
2. Civil proceeding resulting in a finding of fault with a monetary fine, penalty, reimbursement, restitution, and/or damages greater than \$5,000, or other acknowledgment of fault; and/or
3. Administrative proceeding resulting in a finding of fault with either a monetary fine or penalty greater than \$5,000 or reimbursement, restitution, or damages greater than \$100,000, or other acknowledgment of fault?

Not Applicable ▼

3.3.1.10 Information Opt-Out

Registrants were allowed to opt-out of public display of their record within SAM. Opting out may result in a reduction in Federal Government business opportunities, and subcontractors who choose this option will not be visible to prime contractors. Entities that have opted out will be removed only from the SAM public search, but will still be visible to users with For Official Use Only data access and will be provided in accordance with Freedom of Information Act (FOIA) requests. Please note that your banking information is treated as sensitive data and will not be displayed to the public regardless of your selection.

If you do not wish to allow the public to search and view your record:

- Select "I DO NOT authorize my entity information to be displayed in SAM's Public Search."

NOTE: If you are an SBA certified [8A](#) firm, [8A Joint Venture](#) or [HUBZone](#) (or applying for one of these certifications) you should not Opt Out of the public search.

Page Description
Please enter Goods and Services Information

Add NAICS Classification Codes: *

Search NAICS:

Search **Clear**

311222	Soybean Processing
111120	Oilseed (except Soybean) Farming
111110	Soybean Farming

Add

NAICS Codes Selected:

Mark as Primary	NAICS Code	Description	
<input checked="" type="radio"/>	311222	Soybean Processing	X
<input type="radio"/>	111110	Soybean Farming	X

3.4.3.1 Questionnaire

To enter your Reps and Certs, you will be given a questionnaire to guide you through the data necessary for the associated FAR and Defense FAR Supplement (DFARS) provisions (if applicable), as well as the Standard Form 330, Part II for federal Architect and Engineering contracts if applicable. Each question is related to a specific FAR or DFARS provision which is referenced at the end of the question on the screen. Clicking on a reference will take you to the full text version of the provision so that you can read it in full.

3.4.3.2 FAR Responses

The first section of the questionnaire contains the questions related to FAR provisions which are divided into four pages.

Small Business Program Representations (Apr 2012)

EDIT

(a)

(1) The North American Industry Classification System (NAICS) code for this acquisition is See Note.*

(2) The small business size standard is See Note.

(3) The small business size standard for a concern which submits an offer in its own name, other than on a construction or service contract, but which proposes to furnish a product which it did not itself manufacture, is 500 employees.

(b) Representations.

NAICS Code	Name	NAICS Exception	Size Standard	Small Business?
519130	Internet Publishing and Broadcasting and Web Search Portals		500	Y
811212	Computer and Office Machine Repair and Maintenance		\$25,500,000.00	Y
519120	Libraries and Archives		\$7,000,000.00	Y
541310	Architectural Services		\$7,000,000.00	Y

VIEW MORE

(1)** The offeror represents as part of its offer that it is, is not a small business concern (see below).

World Wide:

Total Receipts: *

\$

Average Number of Employees: *

Location (Optional):

Annual Receipts (3 Year Average): \$

Average Number of employees (12
Month Average):**Industry-Specific Size Metrics:**

Barrels Capacity:

Megawatt Hours:

[Cancel](#)[Previous](#)[Save and Continue](#)

3.3.3 Submitting Your Registration

All mandatory data elements must be completed to submit your registration. If you have done this successfully, you will see a green check mark next to each section in the navigation panel on the left side of the screen. Review your registration record in its entirety.

- Click “Edit” to update any necessary information in the registration.
- Click “Submit” to certify that the information is correct.
- SAM will display a confirmation indicating you successfully submitted your registration. You will also receive a confirmation email.

PLEASE NOTE: Your record is NOT yet active.

3.3.3.1 Before Your SAM Registration is considered Active

Your entity’s registration will NOT be considered active until the following actions take place:

- TIN Match validated by the Internal Revenue Service (IRS). It may take three to five business days from the time you submitted for the IRS to validate new and updated records prior to becoming active in SAM.
- CAGE Code or NCAGE code is validated or assigned by DoD, as applicable.

Plan ahead. Allow up to 10 business days after you submit your registration for it to become active in SAM and an additional 24 hours before that registration information is available in other government systems..

You will receive a confirmation email once the registration is activated. At that time, you will be eligible for Federal Financial Assistance from the U.S. Federal Government.

Before your entity registration is complete, you will be asked to provide Mandatory POCs and Optional POCs.

- The POCs you will be asked to provide have been determined based on the answers you provided during the registration process.
- All Mandatory POCs must be completed before the registration may be submitted for certification.
- The next slide will display a listing of the Mandatory and Optional fields required for registration.

POC Field Name	Mandatory / Optional	Mandatory Data Elements
Accounts Receivable POC	Mandatory	First Name, Last Name, Email, and Phone
EDI POC	Mandatory if business wants to be EDI capable	First Name, Last Name, Email, Address, City, Country., Phone, State/Province (if US or Canada), ZIP/Postal Code
Electronic Business POC	Mandatory	First Name, Last Name, Email, Address, City, Country. Phone, State/Province (if US or Canada) and ZIP/Postal Code
Government Business POC	Mandatory	First Name, Last Name, Email, Address, City, Country. Phone, State/Province (if US or Canada) and ZIP/Postal Code
Party Performing Certification POC	Mandatory if you have used a 3rd party certifier for a small business certification.	First Name, Last Name, Email, Address, City, Country. Phone, State/Province (if US or Canada), and ZIP/Postal Code.
Proceedings POC	Mandatory if you have entered proceedings details	First Name, Last Name, Email, Address, City, Country. Phone, State/Province (if US or Canada), and ZIP/Postal Code
Sole Proprietorship POC	Mandatory if Sole Proprietor has been selected as a business type.	First Name, Last Name, Email, And Phone
Electronic Business Alternate POC	Optional	First Name, Last Name, Email, Address, City, Country., Phone, State/Province (if US or Canada), ZIP/Postal Code
Government Business Alternate POC	Optional	First Name, Last Name, Email, Address, City, Country. Phone, State/Province (if US or Canada), and ZIP/Postal Code.
Past Performance POC	Optional	First Name, Last Name, Email, Address, City, Country. Phone, State/Province (if US or Canada), and ZIP/Postal Code.
Past Performance Alternate POC	Optional	First Name, Last Name, Email, Address, City, Country. Phone, State/Province (if US or Canada), and ZIP/Postal Code.
Proceedings Alternate POC	Optional	First Name, Last Name, Email, Address, City, Country. Phone, State/Province (if US or Canada), and ZIP/Postal Code.

If you need to update a POC for an active SAM account, the following steps should be helpful:

1. An individual will need to be designated as an Entity Registration Representative.
2. An individual can be designated for an agency POC for intra-governmental transactions/federal agency registration.
3. You may update the POC list.
4. POCs are for reference only and are not necessarily system users.

USER NAME: PASSWORD:
[Forgot Username?](#) [Forgot Password?](#) [Create an account](#)

HOME | SEARCH RECORDS | DATA ACCESS | GENERAL INFO | HELP

System Account for US Federal Government Agency?

By selecting "Yes", you are confirming your account request is for an official U.S. Federal government information system. You must answer "Yes" to continue. Otherwise, go back and create an individual user account.

Create Account: System **System for US Federal Agency?** Content Glossary

System for US Federal Agency?
Please provide an answer to whether this system account is for a system belonging to a US Federal Government Agency.

System Account for a US Federal Government Agency?

- System for US Federal Agency?
- Entity Information
- Account Information
- Create Password
- Points of Contact
- Summary

SAM | System for Award Management 1.0 IBM v1.P.24.20150116-1831 WWW4

Note to all Users: This is a Federal Government computer system. Use of this system constitutes consent to monitoring at all times.

In the beginning of the presentation we stated the following objectives:

- Complete the NATO Commercial And Government Entity (NCAGE) enrollment steps to receive a NCAGE Code.
- Accurately complete the SAM Registration process.
- Define the difference between an Individual and a System account.
- Resolve questions about SAM by using the Help resources available in the application.
- Contact the Federal Service Desk when unable to resolve questions using Help resources in SAM.

In the beginning of the presentation we stated the following objectives:

- Resolve discrepancies between NCAGE and D&B legal business name.
- Explain the purpose of the DUNS +4 extension.
- Define the difference between Mandatory and Optional fields required for POC information.

Have we achieved our objectives ?

Thank you for your participation today

www.interact.gsa.gov

iaeoutreach@gsa.gov