



A Quick Overview

SYSTEM FOR AWARD MANAGEMENT



<https://www.sam.gov>

FIRST, BECOME FAMILIAR WITH SAM'S TRAINING TOOLS

- ◎ Start by going to www.sam.gov, and then click on the **SAM HELP** tab Under User Help where full a “**User Guide**” as well as “**Quick Start Guides**” are available
- ◎ Helpful Hints will help the registrant create an account, migrate roles, perform updates, and search for the information a recipient needs

THE LAWS

- ◎ Public Law *109-282, Federal Financial Accountability and Transparency Act (FFATA)*
- ◎ 48 CFR, Chapter 1, 52.204-7 System for Award Management, and
- ◎ 48 CFR, Chapter 1, 52.204–8, Annual Representations and Certifications
- ◎ The Paperwork Reduction Act of 1995 (44 U.S.C. Chapter 35)

WHO SHOULD USE SAM

- ◎ **SAM** is used by anyone interested in the business of the Federal Government, including:
 - Entities (contractors, federal assistance recipients, and other potential award recipients) **who need to register to do business with the government**, look for opportunities or assistance programs, or report subcontract information
 - Government contracting and grants officials responsible for activities with contracts, grants, past performance reporting and suspension and debarment activities
 - Public users searching for government business information.

CREATE A **SAM** ACCOUNT

- ① **SAM** includes information of various sensitivity levels
- ① Public data is available to search and view without having to login or register for a **SAM** account
- ① Public users that want to save their searches must register for a **SAM** user account

CREATE A **SAM** ACCOUNT

- ◎ *Government users needing access to sensitive data must register for a **SAM** user account*
- ◎ *By registering, Government users should find the entity, if registered, listed*



CREATE A SAM ACCOUNT

- ① An account provides access to SAM functionality such as saving search queries, requesting roles and accessing non-public information
- ① User and Password will expire in 90 days and SAM Account must be renewed annually
 - Protects Personal Identifiable Information and functionality

HTTP://SAM.GOV



SAM System for Award Management

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](#)

Submitted a SAM registration?

[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

Please note that SAM user account passwords need to be updated periodically to meet security standards. Instructions to reset your password can be found in the [SAM User Guide](#).

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.

FORMER CCR REGISTRANTS

If you had an active record in CCR, you have an active record in SAM. You do not need to do anything in SAM at this time, unless a change in your business circumstances requires updates to your Entity record(s) in order for you to be paid or to receive an award or you need to renew your Entity(s) prior to its expiration. SAM will send notifications to the registered user via email 60, 30, and 15 days prior to expiration of the Entity. To update or renew your Entity records(s) in SAM you will need to create a SAM User Account and link it to your migrated Entity records. You do not need a user account to search for registered entities in SAM by typing the DUNS number or business name into the search box.

ACCESSING SEARCH

- ① There are several ways to access search capabilities in **SAM**
- ① The Search tab is always displayed on the navigation bar at the top of the page—see next slide
 - Click the “**SEARCH RECORDS**” tab to open the Search page
 - Government employees must create an account in order to search the records

SEARCHING AN REGISTRANT

- Log into <http://www.sam.gov> and create a SAM Individual User Account
- Select “**Register New Entity**” under “**Register/Update Entity**” on your “My **SAM**” page
- Select the type of entity, most likely “Business or Organization.”

SAM NAVIGATION BAR

The screenshot shows the top navigation bar of the SAM system with links for MY SAM, SEARCH RECORDS, DATA ACCESS, GENERAL INFO, and HELP. A search bar is located on the right side of the bar. Below the navigation bar, the page title is "Search Records". The main content area contains several sections of text and search options.

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: You can only use one search bar at a time.

(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.

RESPONSIBLE PARTY

- ◎ Recipients must tell the system why they are registering in **SAM**. This determines what information they must provide:
 - Is the interest in bidding on Federal contracts?
 - Is the interest in becoming eligible to apply for grants or other Federal financial assistance?
 - If registrant says “**no**” to the contract question and “**yes**” to the grants question, registrant will only have to complete the grants related information
 - Are you a Government employee searching for entity records?

COMPLETE THE REGISTRATION

- ◎ Complete your registration
- ◎ Remember, there will be a red asterisk (*) next to the name field indicating that you must provide information
- ◎ If **SAM** sends you, the registrant, an email, follow instructions provided or nothing will happen



A FEW HELPFUL HINTS FOR REGISTRANTS

- On the Business Information page, you will create a Marketing Partner Identification Number (**MPIN**)
 - Write your **MPIN** down—it is used as a password on other government systems such as Grants.gov
 - If you do not pay U.S. taxes, do not enter a **TIN** or select a **TIN** type—leave these fields blank

A FEW HELPFUL HINTS FOR REGISTRANTS

- ◎ Only use the **NCAGE** code with the **DUNS #** and only use the **DUNS #** created to register in SAM
 - Remember, the name and address information must match on the **DUNS** and **NCAGE** records
- ◎ Make sure to select “**Foreign Owned and Located**” on the General Information Page

A FEW HELPFUL HINTS FOR REGISTRANTS

- ⦿ As a foreign entity, a registrant does not need to provide **Electronic Funds Transfer** (EFT) banking information on the Financial Information page
 - If you do choose to provide this electronic banking information, it must be for a U.S. bank; **SAM** cannot accept foreign banking information.
 - Recipients only need to provide name and address; the only mandatory information on this page

A FEW HELPFUL HINTS FOR REGISTRANTS

- ⦿ In the “**Points of Contact**” section, list the names of people in your organization who knows about this registration in SAM and why you want to do business with the U.S. Federal government. These are called “**Points of Contact**” or **POCs**
- ⦿ Make sure to hit [**Submit**] after your final review. You will get a Congratulations message on the screen. If you do not see this message, you did not submit your registration.
- ⦿ What happens next?

WHAT HAPPENS NEXT?

- ⦿ After registering in D&B DUNS
- ⦿ Next step is to register with the **Internal Revenue Service (IRS)** (if required to have a **TAX IDENTIFICATION NUMBER or TIN**); and
- ⦿ Then acquire a **NATO Commercial and Government Entity (CAGE) Code**
- ⦿ Registrant will receive an email from **SAM.gov** upon completion of registration

TIMEFRAME

- ◎ Allow up to **10 business days** after you submit your application to before your registration is active in **SAM**, then an additional 24 hours for other systems such as **Grants.gov** to recognize your information



REMEMBER

- ◎ Just as it was in the Excluded Parties List System (EPLS), there are some searches that require additional information and exact matches to prevent phishing for information
- ◎ For example, if you search by a **D&B DUNS number** or **IRS Tax Identification Number...**
 - Required to provide the first and last name of the entity or vice versa

WHAT IF I HAVE SEARCHED AND DID NOT FIND A RECORD

- ⦿ Try an inactive search for the record
 - It is possible that the recipient did not finish the registration
 - Or, **SAM** has not completed the validation with the **IRS**, **D&B DUNS** or **NCAGE**
 - Or, the applicant may have a negative credit history or may owe a debt to the U.S. Government
- ⦿ Acquire an **USER account** by registering in **SAM** and then, conduct a search

HOW DO MODIFICATIONS TAKE PLACE

- ⦿ Modifications take place when **SAM** sends an email message to the foreign or U.S applicant/recipient
- ⦿ Applicant/recipient must follow instructions provided by **SAM**
 - Registrant must return to the application system that **SAM** refers them to and follow-through
 - Otherwise, the information will sit in whatever application the applicant is requested to modify and nothing will happen

SEARCH FOR EXCLUSION RECORDS



- ◎ On the Home Page or the Search Records tab, type the Entity's name, **D&B DUNS number**, or **NCAGE Code** in the search bar and click on the Search icon

ENTITY RECORD

- ⦿ If an exclusion record is not found for the entity, the entity does not have an **active exclusion** submitted in SAM by an U.S. Federal agency
- ⦿ If an exclusion record is found, it will display in a box marked “Exclusion” in purple; check the status in the top-right corner of the box—see next slide
- ⦿ If the status indicates “**Active**”, there is an active exclusion for that entity.

WHAT DOES AN ENTITY RECORD LOOK LIKE

The screenshot displays two entity records in a list view. The first record is for 'AL HUDA CONTRACTING COMPANY LLC', which is an active entity. The second record is for 'Al-Methwad Company', which is also marked as active but is highlighted with a callout bubble indicating it is debarred or suspended.

Entity	Name	Status
Entity	AL HUDA CONTRACTING COMPANY LLC	Status: Active +
DUNS:	366458573 +4:	CAGE Code:
Has Active Exclusion?:	No	DoDAAC:
View Details		
Exclusion	Al-Methwad Company	Status: Active +
DUNS:	U00000451 +4:	CAGE Code:
Classification:	Firm	
View Details		

Debarred and/or Suspended Entity

ENTITY RECORD

- ⦿ Note that the search result with the green box marked “Entity” and is an Entity Management search result
- ⦿ The result with the purple box marked “**Exclusion**” is Performance Information (**Exclusion**) search result
 - This is a debarred and/or suspended entity

MOST COMMON ISSUES WITH REGISTRATION PROCESS

- Information about the **Legal Business Name and Address** does not match exactly
- Did not complete registration
- Tax code entered in SAM is not an **U.S. Tax Identification number**, but rather another ID number of some sort or entered incorrectly
- Did not register in and acquire a D&B DUNS # nor did they acquire an NCAGE Code
- Instructions in **SAM** are not followed or entity did not ensure **Business Legal Name and Address** are exactly the same in all 3 business systems.

WHAT IS THE ALTERNATIVE IF THE APPLICANT IS EXCLUDED?

- ◎ UNABLE TO AWARD FEDERAL ASSISTANCE FUNDS
 - If individual or entity is debarred or suspended, the applicant cannot receive an award for Federal assistance funds
 - If listed with a debt to the U.S. Federal Government, the applicant cannot receive an award of Federal Financial Assistance until funds are paid and confirmation provided by that entity/agency or the Department of Treasury



ARE THERE ASSOCIATED COST?

- There will NEVER BE A COST associated with registering in **D&B DUNS, NCAGE, or SAM**



RENEWAL REQUIRED?

- ⦿ Renewal is required annually to validate information or make changes based on the entities business changes or a change in the **Authorized Organization Representative (AOR)**
- ⦿ Must start at the beginning by modifying
 - **D&B DUNS**
 - **NCAGE Code**
 - **SAM**

SAM CONTACT INFORMATION

Sends information from the registrant to application systems to validate

For help outside the U.S., contact the Federal Service Desk (FSD) at 1-866-606-8220 (toll free) or at 1-334-206-7828 (internationally)

SAM Helplink: <https://www.fsd.gov/clients>



WEBFORM, CHAT OR CALL



Federal Service Desk	Contact FSD	News and Announcements
<p>...ice Desk (FSD.gov) is to ...and assistance they need ...ne FSD supports.</p> <p>...ct FSD for help with:</p> <p>...agement (SAM)</p> <p>...estic Assi</p> <p>...nt</p> <p>...C</p> <p>...Reporting</p>	<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>FSD.gov Now Offers Live Chat!</p> <p>In addition to being able to call or submit a webform you can now "Live Chat" with an FSD.gov agent! To access this feature please log into your FSD.gov account and select chat under the Contact FSD menu.</p>

Must create an account with WWW.FSD.GOV to access webform or chat

Contact Virginia Hernandez at HernandezVT@state.gov for further assistance.

