ASSISTING SMALL BUSINESSES THRU
SAM.gov TRAINING

PATH TO PROSPERITY

JACQUELINE DAVIS-SLAY | SENIOR ADVISOR | USDA
JEFFREY DAVIS | OUTREACH COORDINATOR | USDA
ANNA MARIA LUCAS | DIRECTOR | SBA
CAMERON DOSS | CHIEF | FDIC
DAVID RAMOS | SR. COMMUNITY AFFAIRS SPECIALIST | FDIC
BRITTANY SHAW | PROGRAM SPECIALIST | FDIC

Diana Leonardo

GSA National Account Manager

Garrett J. Pride

GSA Customer Service Director, USDA Accounts

SAM.gov Training for Small Business
Path to Prosperity

Ivana Henry
Outreach and Stakeholder Engagement Division
GSA Integrated Award Environment (IAE)
samtraining@gsa.gov

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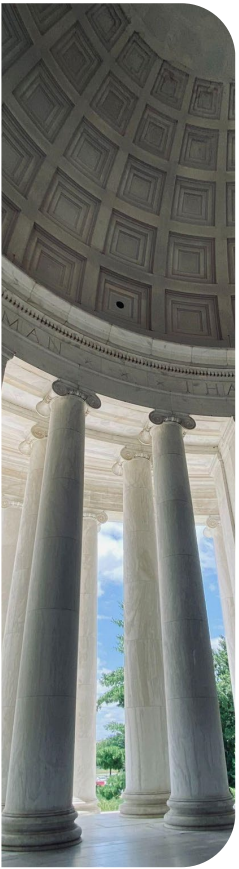
Topics

- Overview of SAM.gov
- Entity Registration Walkthrough
- Tips & Tricks
- Getting Help with SAM.gov
- Questions & Answers



Poll: About You

- Are you or your office already doing business with the Federal Government?
- How long have you been involved with managing your organization's registration in SAM.gov?
- Is your organization based outside of the United States?

SAM.gov Overview

SAM.gov Overview

SAM.gov is an official U.S. government website managed by the Integrated Award Environment (IAE), a federal office within GSA.

You can use SAM.gov to **become eligible** to bid on and receive payment for U.S. federal government contracts or apply for and receive federal financial assistance.

The government does **not** charge any money to register or maintain your entity registration in SAM.gov.

Beware of misleading marketing, imposters, and phishing. SAM.gov does not contact individuals by phone to solicit, review, or make awards. Never share your SAM.gov account email and password.

SAM.gov is used for:

- **Getting a Unique Entity ID (UEI)** and **Registering** to do business with the U.S. federal government
- **Searching and viewing:**
  - Entities
  - Contract Opportunities
  - Assistance Listings
  - Exclusions
  - Responsibility/Qualification records
  - Wage Determinations
  - Contract Data Reports

Definitions

What is an entity? “Entities” in SAM.gov are corporations, organizations, partnerships, or individuals that submit information about themselves to the U.S. federal government to be eligible for federal funds through contracts, grants, or other financial assistance. We use “**international entity**” to refer to any entity based outside of the U.S. For a thorough definition, please see the Code of Federal Regulations, 2 CFR 200.1.

What is entity validation? Entity validation confirms an entity’s existence, location, and uniqueness, and is required by the Federal Acquisition Regulation (FAR) part 52.204-6. The uniqueness of an entity is based on it being a separate legal entity with a separate physical address. SAM.gov also verifies that there is no existing record for your entity before you validate. Once your entity is validated, you get a Unique Entity ID.

What is a Unique Entity ID (UEI)? SAM.gov assigns a Unique Entity ID to entities when they pass validation. The Unique Entity ID is a 12-character code used in SAM.gov and other federal government systems to identify a unique entity. Once you have a Unique Entity ID, you can register your entity in SAM.gov.

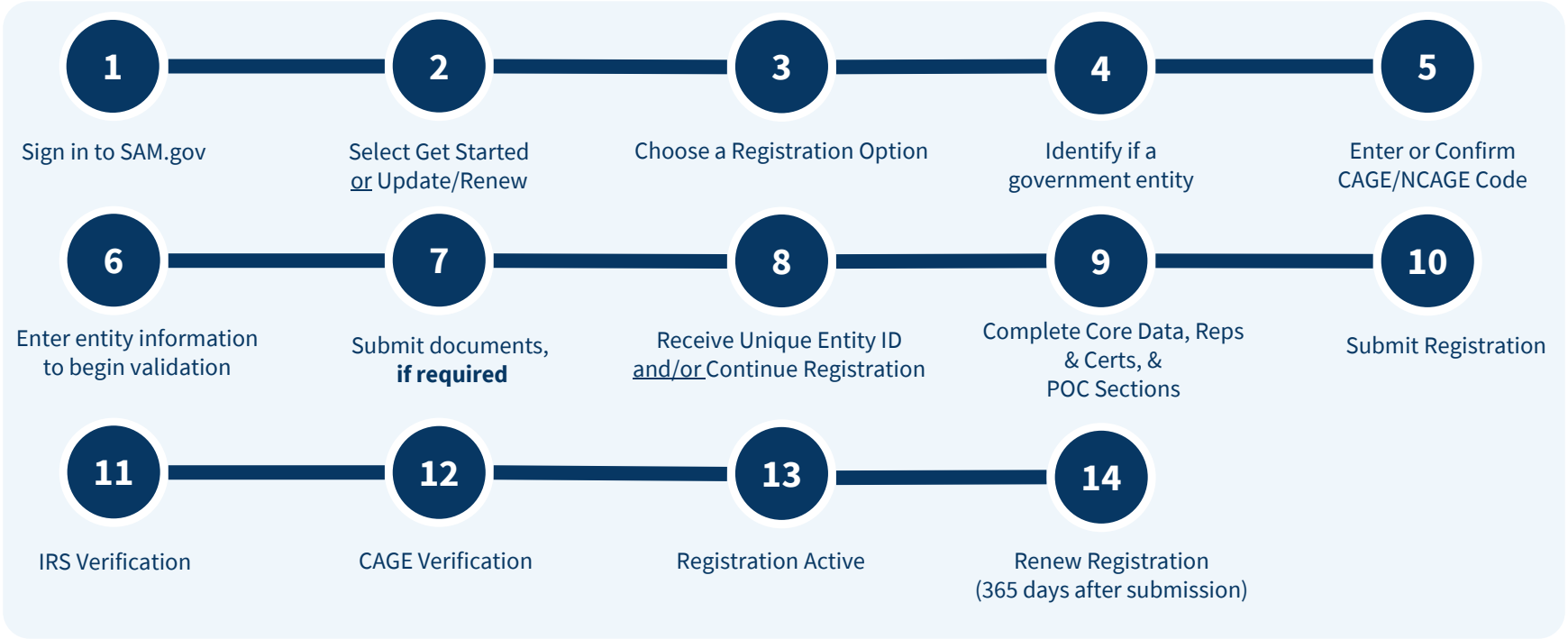
What is entity registration? An entity registration allows you to apply directly for U.S. federal government contracts and assistance. You must renew your registration annually to keep it active. We recommend that you begin your renewal 30–60 days before your registration expires to have enough time to validate your entity and complete the registration.

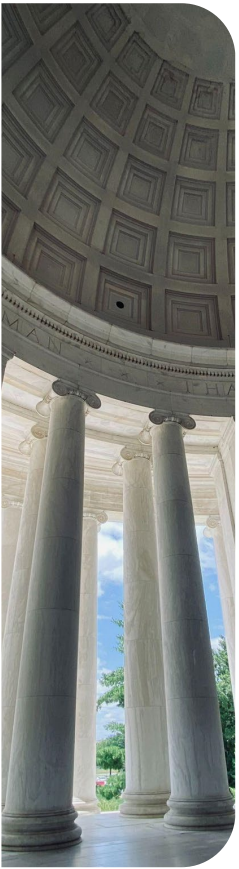
Be Prepared! What Do I Need Before I Begin?

01	**Review the Entity Registration Checklist and Start Early**	Entity registration requires a lot of information about your organization. Find the questions you must answer and documents that may be required.
02	**Decide who will complete the registration update/renewal**	SAM.gov will grant the the Entity Administrator role to the first person who registers. This will be only person with access until they assign roles to other users.
03	**Identify backup Entity Administrators**	You can have as many people as you want with access to view and update the entire registration. Don't get stuck in this longer process!

Steps to Register Your Entity at SAM.gov

Entity Registration has many steps and **verifications** that happen both within and outside of SAM.gov.





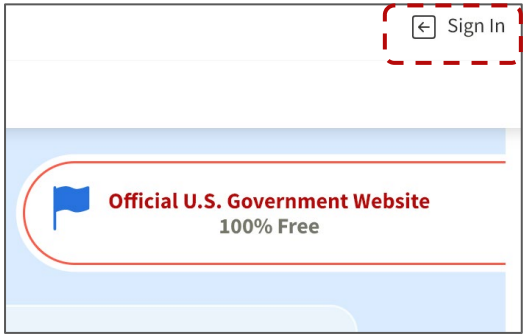
Knowledge Check Poll

- True or False? Registering in SAM.gov means getting a Unique Entity ID.
- How many individuals can be assigned to manage and update your organization's registration in SAM.gov?
- How often do SAM.gov registrations expire?

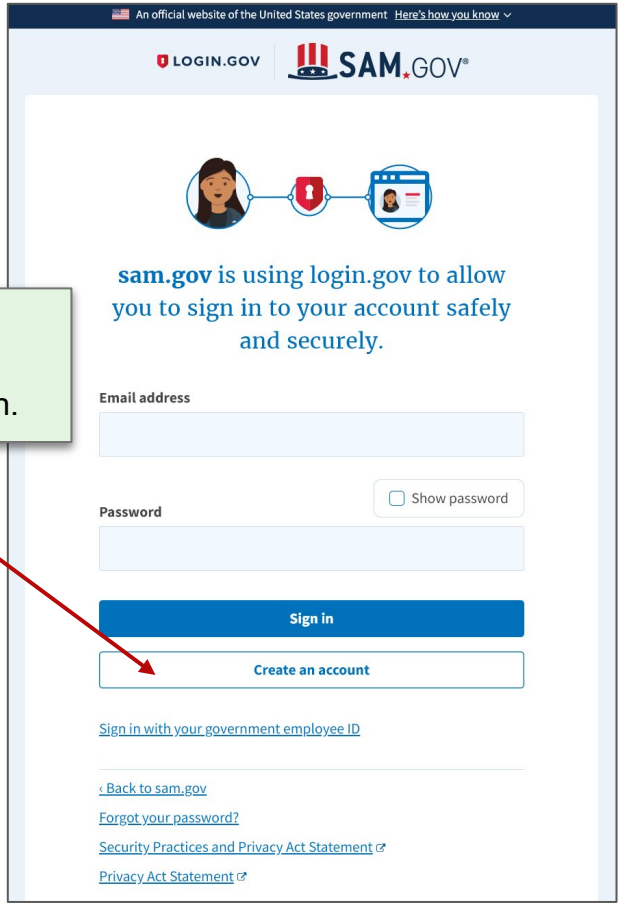
Entity Registration Walkthrough

1

Sign in to SAM.gov



To create a new user account, select the **Create an Account** button.



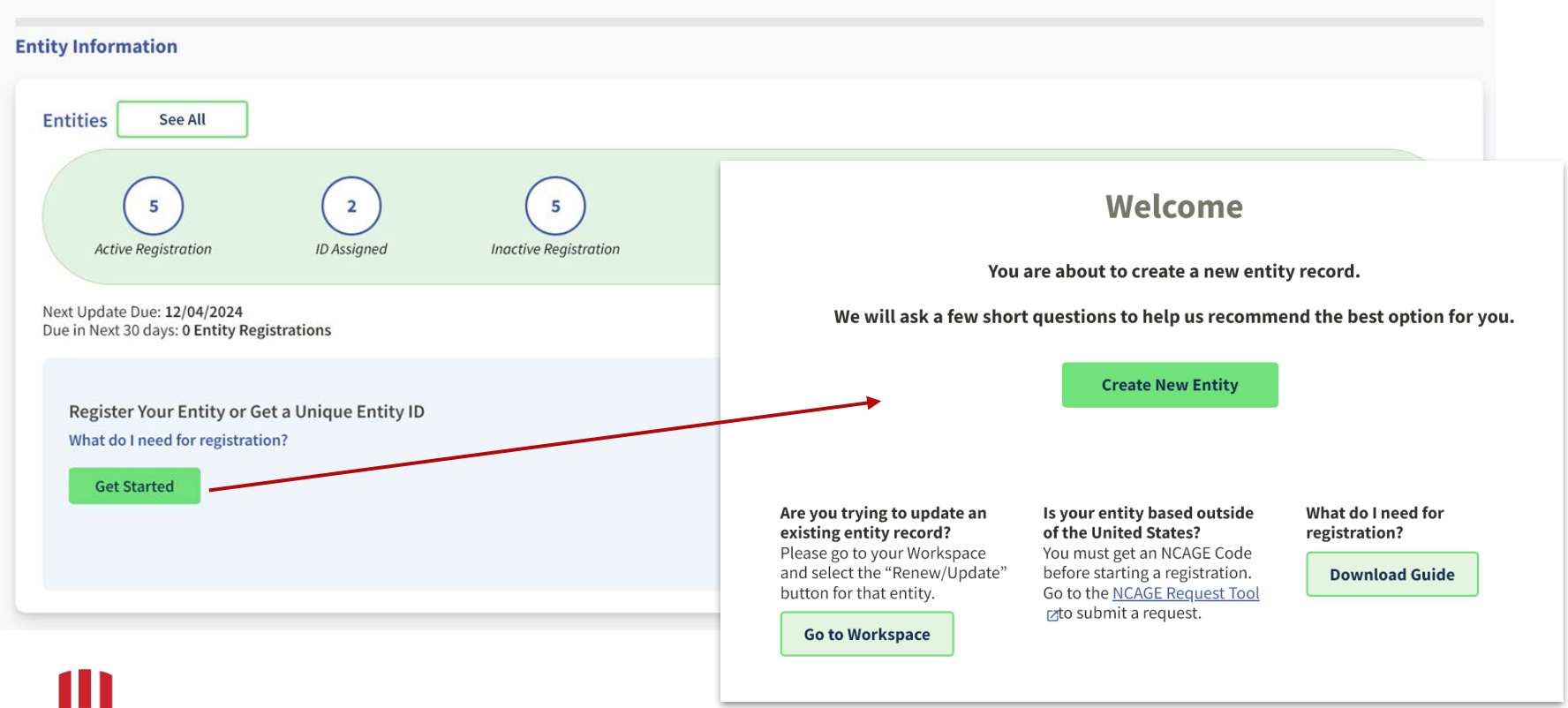
Roles *(what you can see and do in SAM)* are tied to the email address you use to sign in to SAM.gov.

One-time Password (OTP) codes, required at different steps in the registration process, are sent to the email address you use to sign in to SAM.gov.

Each employee who needs access must create their own user account. Do NOT share accounts.

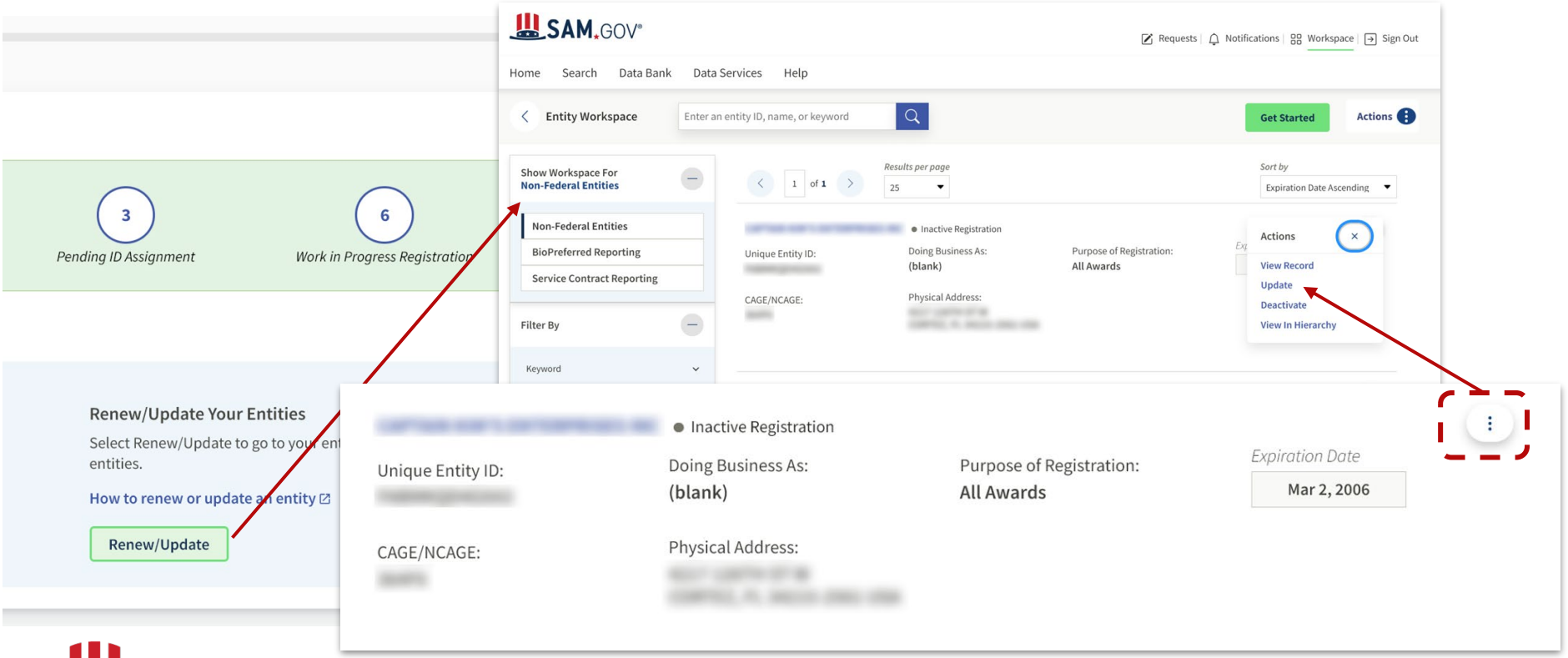
2

New Entity: Select Get Started



2

Updating Entity: Select Renew/Update



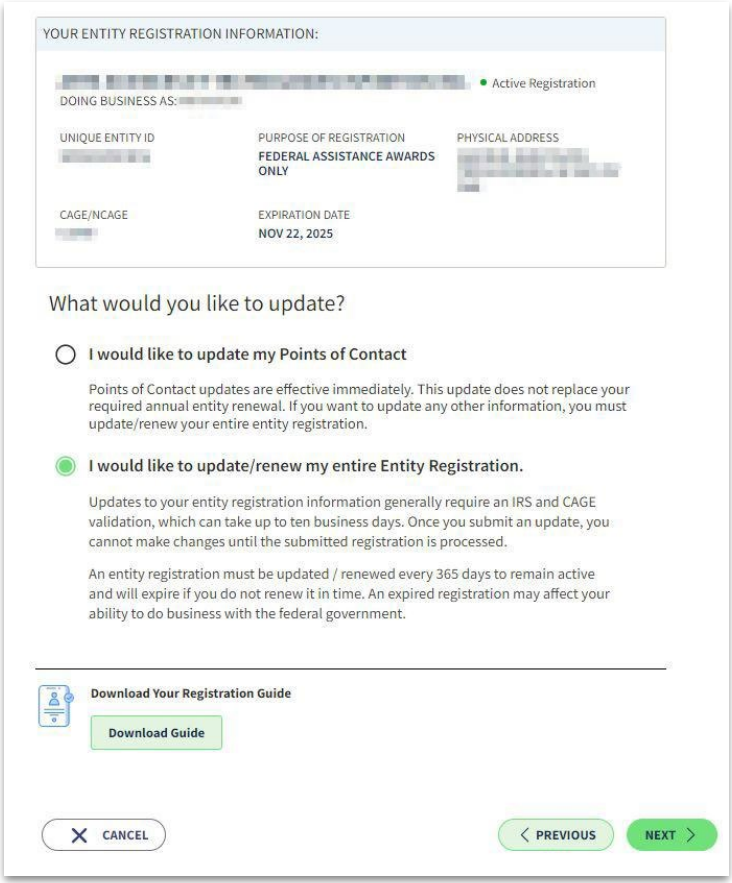
2

Updating Entity: Renewal/Update Options

Your current entity registration is displayed.

Points of Contacts can be updated quickly without additional processing.

To update any other information, you must update/renew the entire entity registration.



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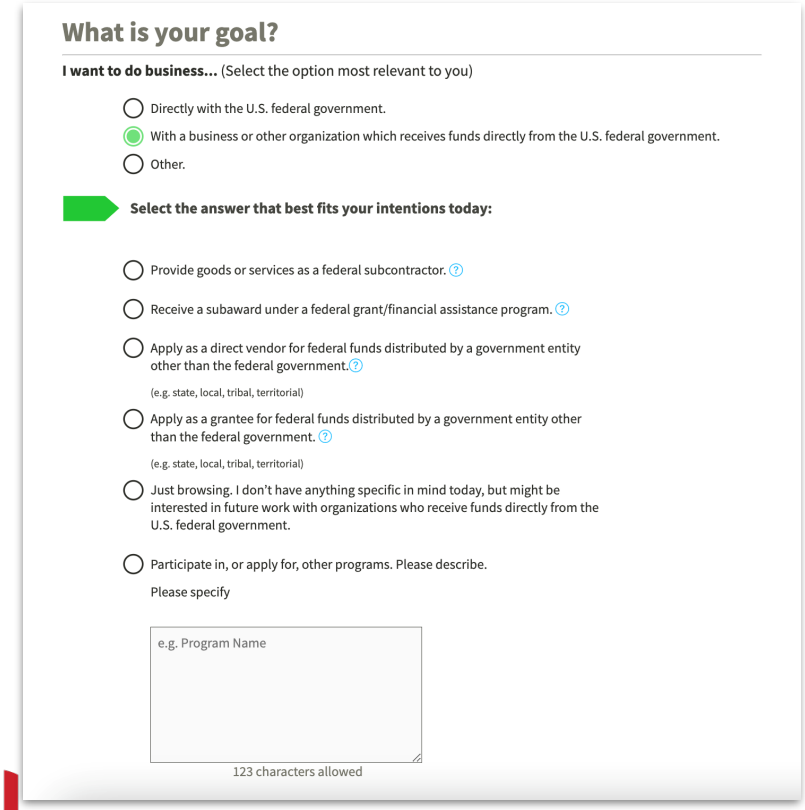
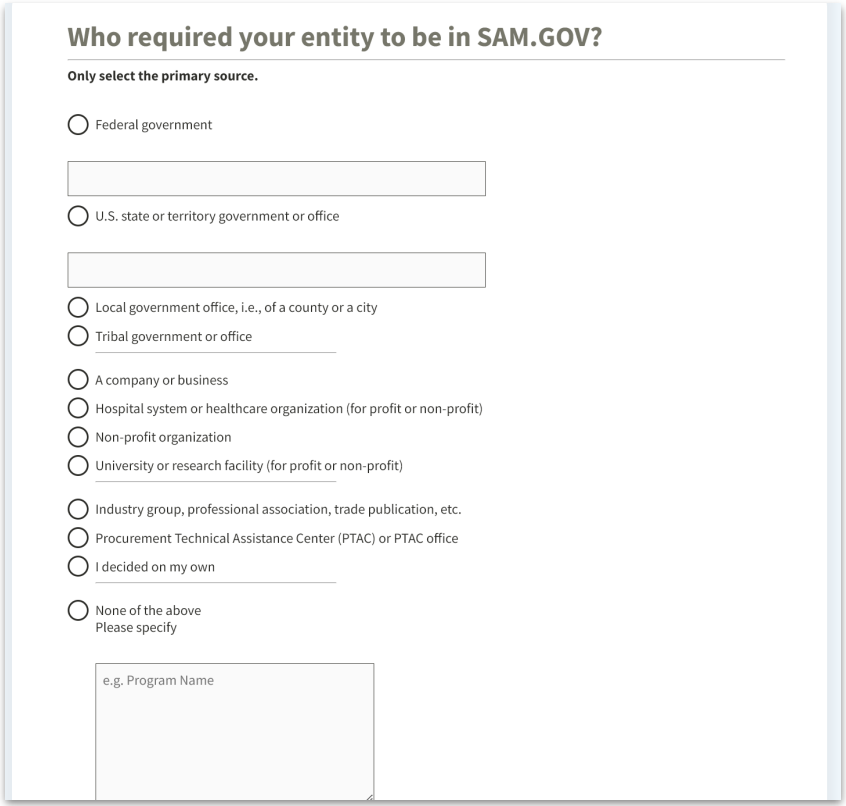
3

Choose Registration Option

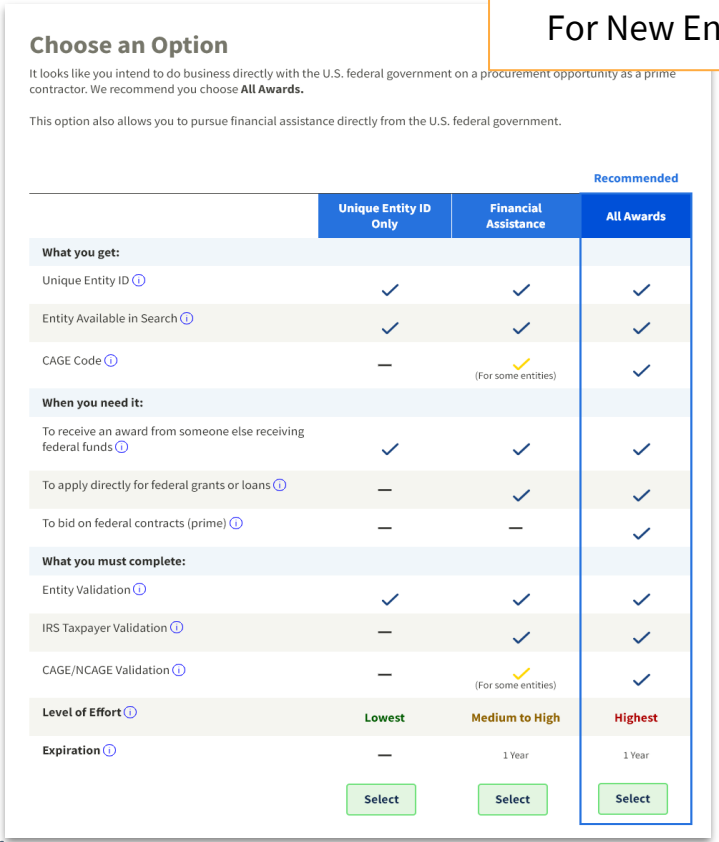




3

Choose a Registration Option

For New Entities



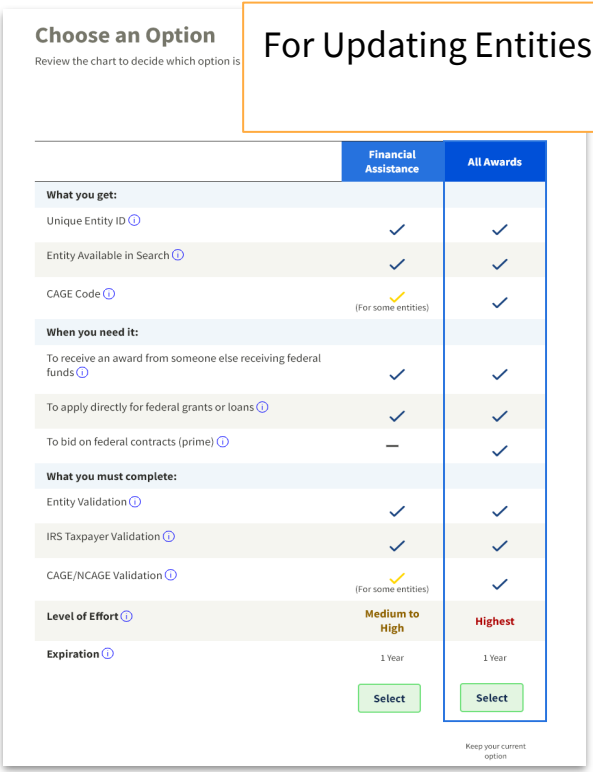
Choose an Option

It looks like you intend to do business directly with the U.S. federal government on a procurement opportunity as a prime contractor. We recommend you choose **All Awards.**

This option also allows you to pursue financial assistance directly from the U.S. federal government.

	Unique Entity ID Only	Financial Assistance	All Awards (Recommended)
What you get:			
Unique Entity ID	✓	✓	✓
Entity Available in Search	✓	✓	✓
CAGE Code	–	✓ (For some entities)	✓
When you need it:			
To receive an award from someone else receiving federal funds	✓	✓	✓
To apply directly for federal grants or loans	–	✓	✓
To bid on federal contracts (prime)	–	–	✓
What you must complete:			
Entity Validation	✓	✓	✓
IRS Taxpayer Validation	–	✓	✓
CAGE/NCAGE Validation	–	✓ (For some entities)	✓
Level of Effort	Lowest	Medium to High	Highest
Expiration	–	1 Year	1 Year
	Select	Select	Select

For Updating Entities



Choose an Option

Review the chart to decide which option is

	Financial Assistance	All Awards
What you get:		
Unique Entity ID	✓	✓
Entity Available in Search	✓	✓
CAGE Code	✓ (For some entities)	✓
When you need it:		
To receive an award from someone else receiving federal funds	✓	✓
To apply directly for federal grants or loans	✓	✓
To bid on federal contracts (prime)	–	✓
What you must complete:		
Entity Validation	✓	✓
IRS Taxpayer Validation	✓	✓
CAGE/NCAGE Validation	✓ (For some entities)	✓
Level of Effort	Medium to High	Highest
Expiration	1 Year	1 Year
	Select	Select

Keep your current option

4

New Entity: Identify if Entity Type is Government

Are you registering a government entity?

Select **Yes** if you are registering an official organization, department, or institution of a U.S. state, U.S. local, U.S. tribal, or foreign government.

- ○ Yes
- ◉ No
  - ◉ My entity is physically located in the United States
    (If entity is physically located in US territory, then you can select entity located in the United States.)
  - ○ My entity is not physically located in the United States

⚠ If you are unsure whether you are registering a government entity, check with your governm
authorities to confirm. Each government determines for itself what qualifies as a governmer
entity. Private companies with a public mission generally do not qualify.

× CANCEL PREVIOUS

Do you already have a CAGE code?

The Commercial and Government Entity (CAGE) code is a five-character, alpha-numeric identifier assigned to entities located within the United States and its outlying areas by the Defense Logistics Agency (DLA) CAGE Program. All registrations go through CAGE Code assignment and validation.

The CAGE code is different from the Unique Entity ID assigned in SAM.gov. It is used by the federal government for procurement and acquisition processes, like invoicing or pre-award verification.

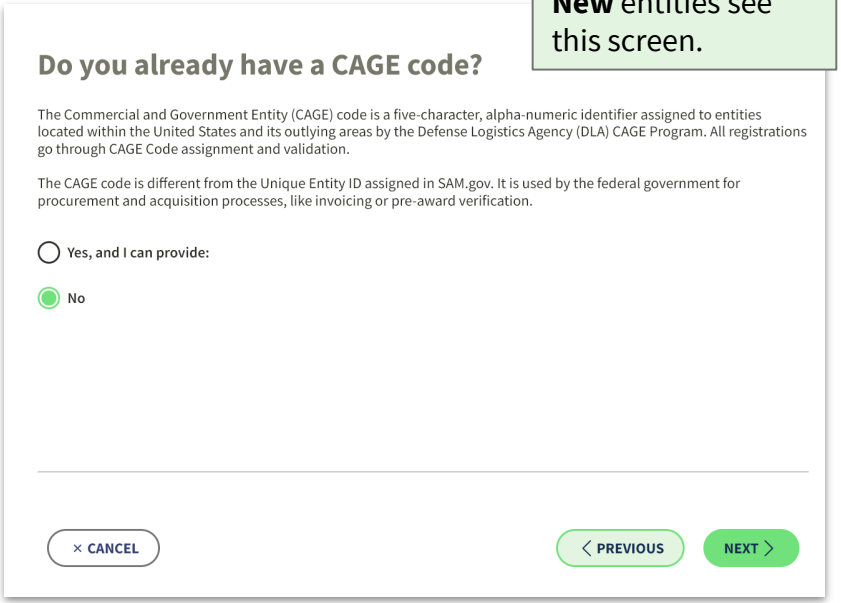
- ○ **Yes, and I can provide:**
- ◉ **No**

× CANCEL PREVIOUS NEXT

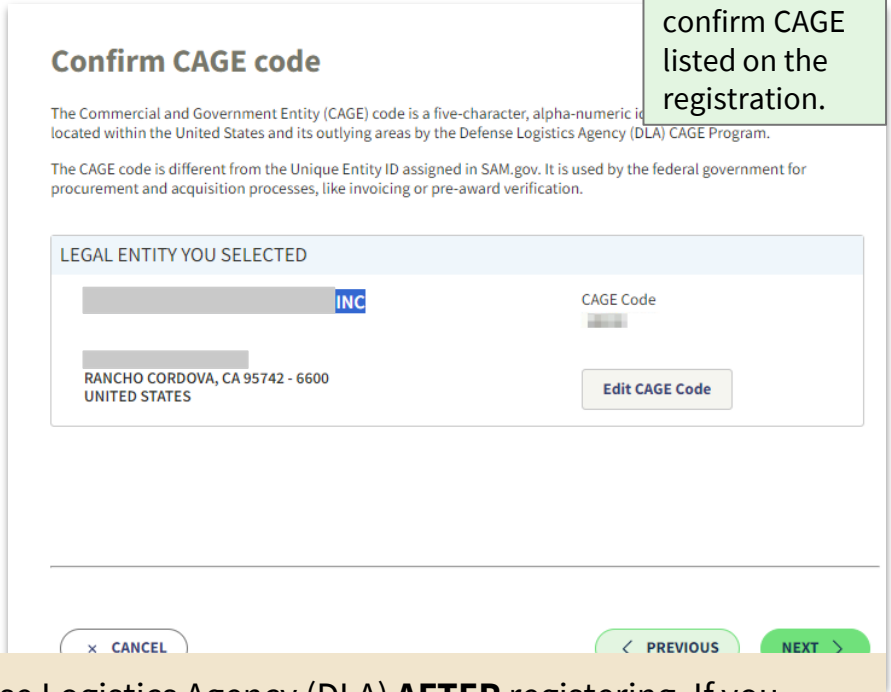
5

Enter or Confirm CAGE Code

New entities see this screen.



Updating entities see this screen to confirm CAGE listed on the registration.



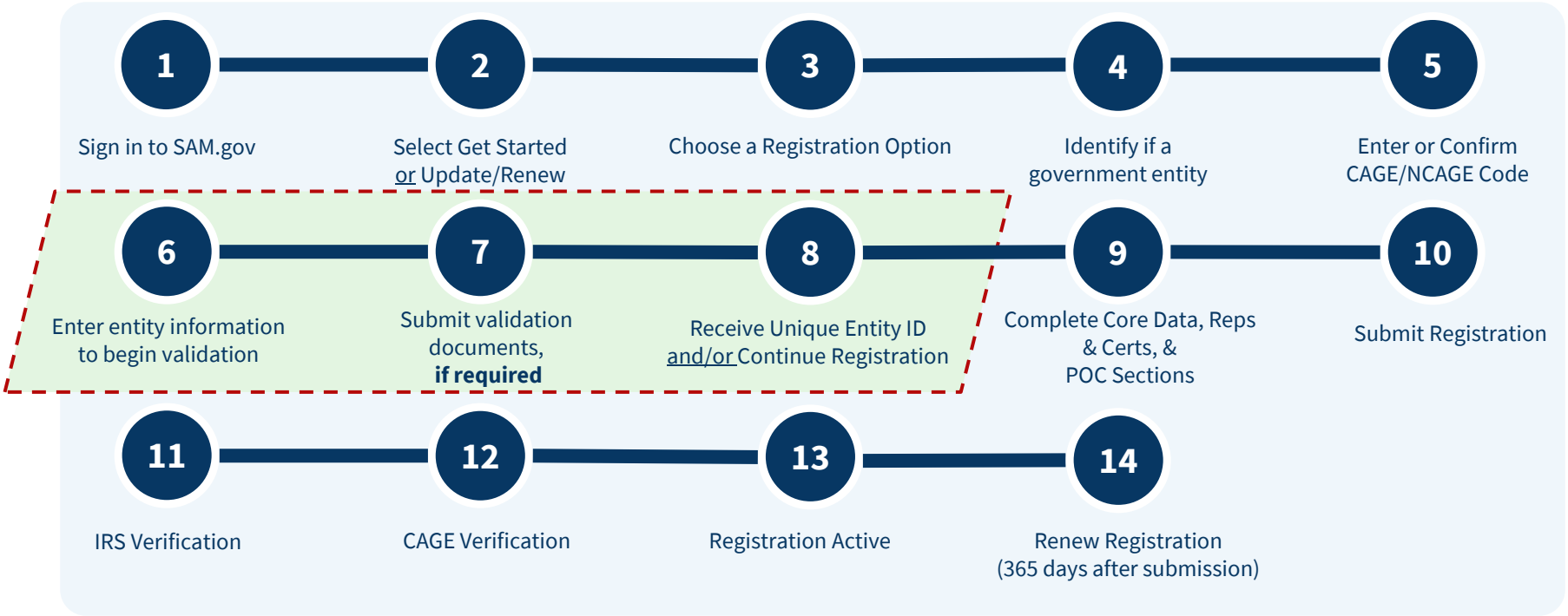
U.S. entities typically receive CAGE code from the Defense Logistics Agency (DLA) **AFTER** registering. If you already have a CAGE code which was previously assigned by the Defense Logistics Agency (DLA) you can enter it.

Non-US entities must obtain/update their NCAGE code using the NATO NSPA NCAGE Request Tool **BEFORE** they can proceed to register in SAM.gov

Deep Dive into Entity Validation

Entity Validation

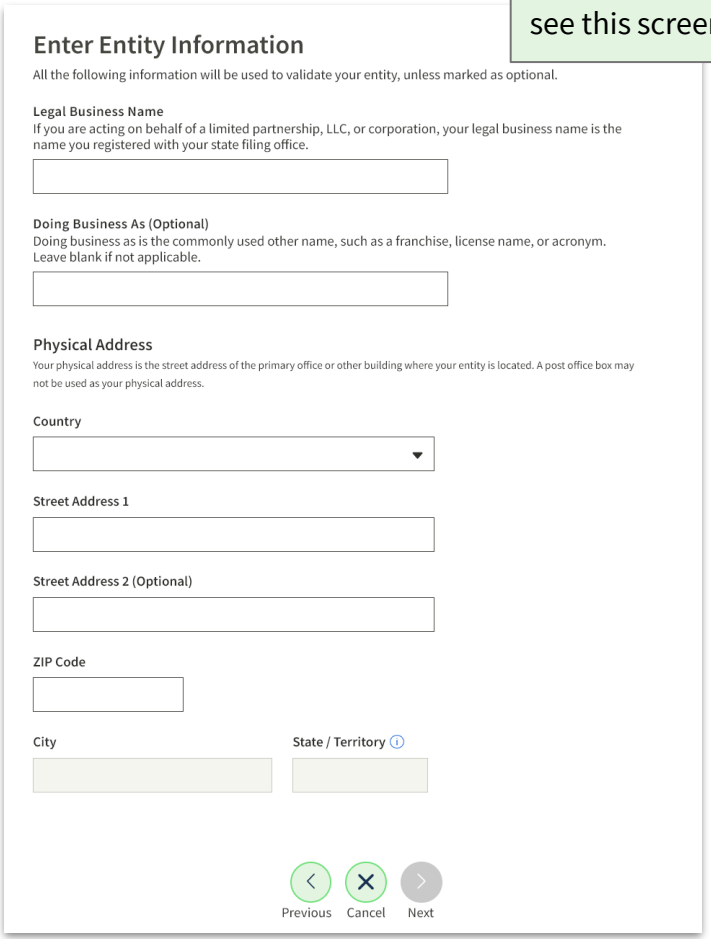
Entity Validation is one of the verifications within the registration process and is a prerequisite to completing it.



6

New Entity: Begin Validation

New entities see this screen.



Enter Entity Details:

Details you enter should match your official documentation.

Do not enter anything in optional fields, such as Doing Business As (DBA), unless they are applicable and supported by your documentation.

SAM.GOV

6

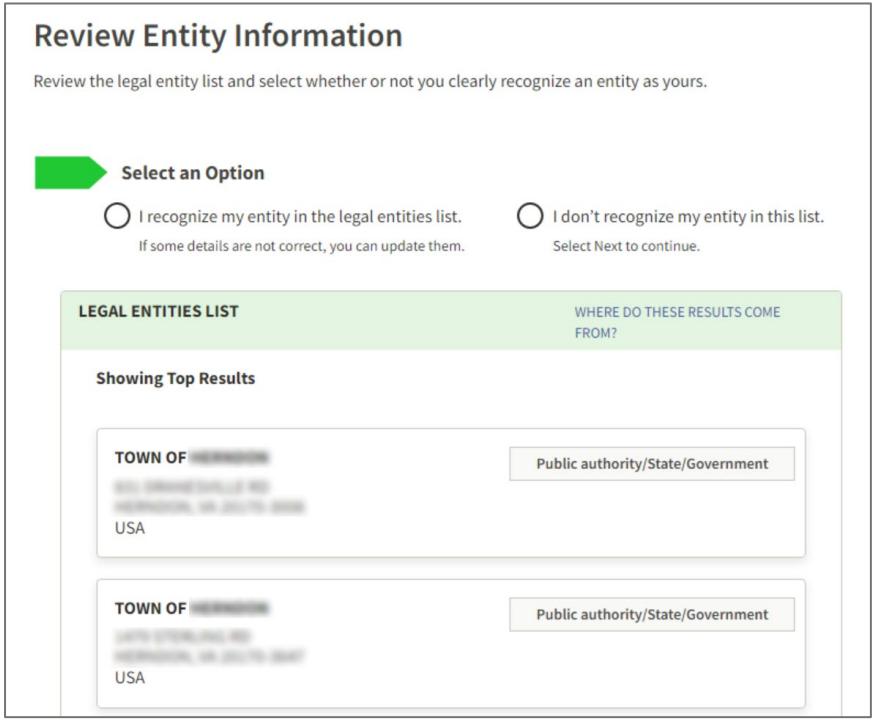
New Entity: Begin Validation

Confirm Entity Details:

If the entity is shown in the list, it should be selected.

Some entities may be shown, but with outdated information, like an old address.

Entities should select their entity even if some of the information isn't up to date. You will be able to request updates on the next screen.



6

New Entity: Begin Validation

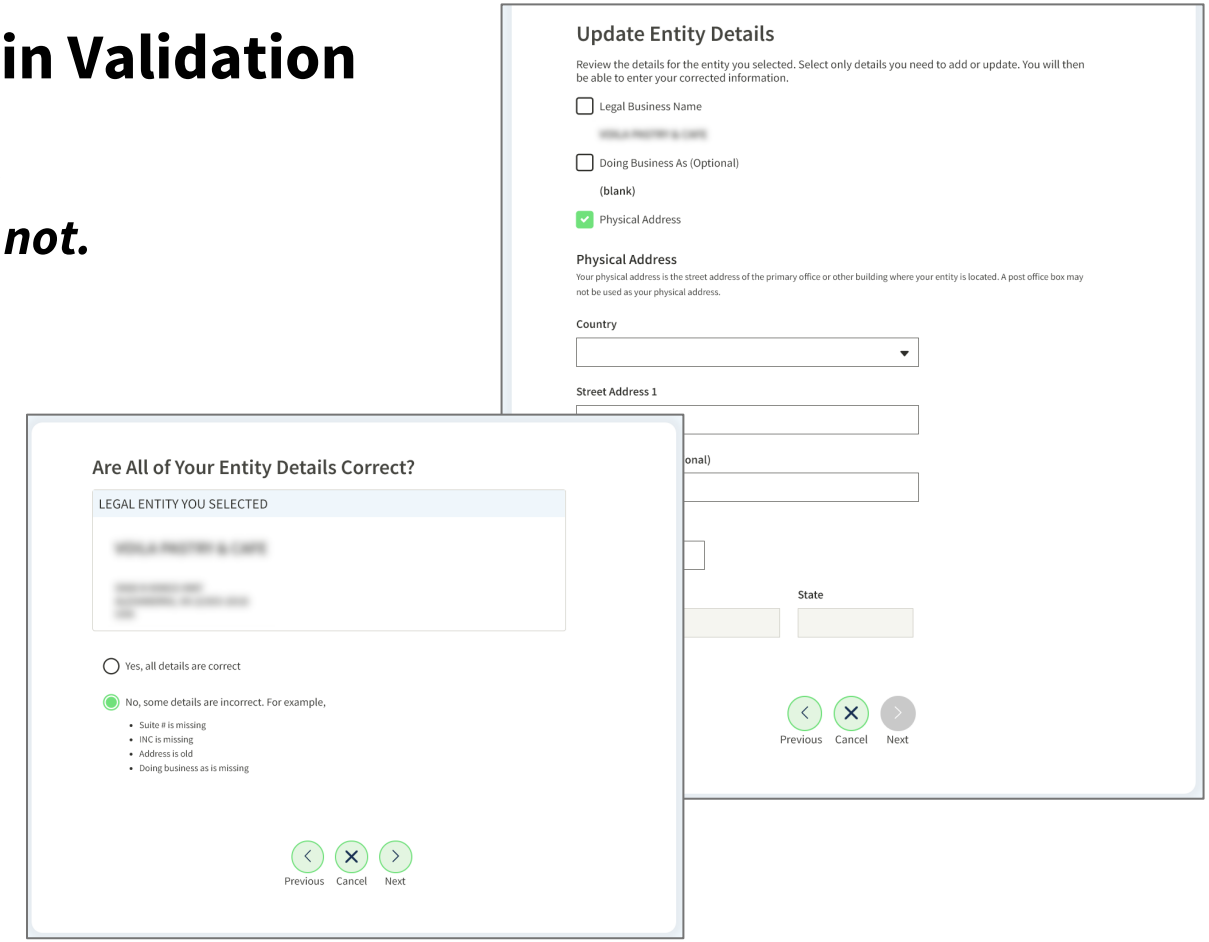
Confirm if all entity details you selected are correct or not.

If everything is correct,

the entity validates right away.

If something isn't right, select "No."

Then, on the next page,
submit corrections it.



6

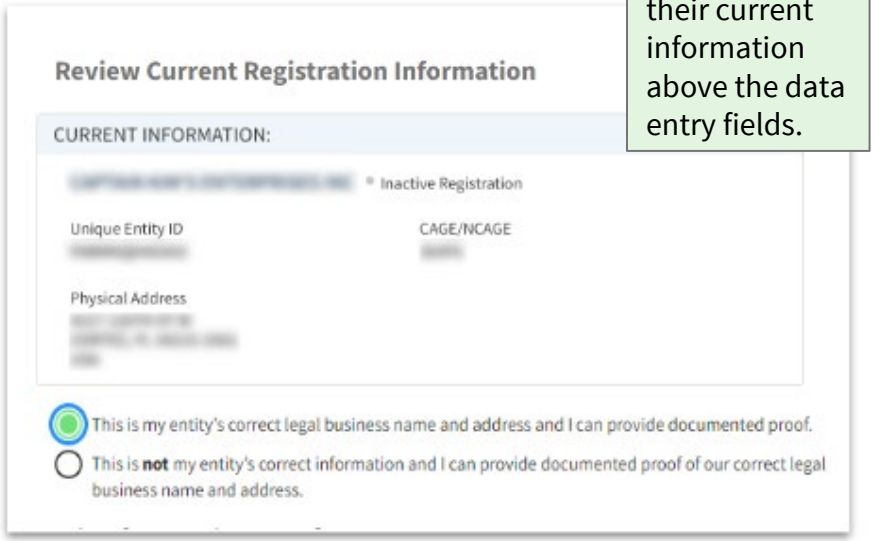
Updating Entity: Begin Entity Validation

Updating entities see their current information above the data entry fields.

Confirm Entity Details.

If everything is correct on your current registration, the entity should validate right away.*

If something isn't right or has changed since your last update, select the second option. Then, on the next page, submit corrections.



* *Entities that have not yet validated their entity details in SAM.gov since the the Entity Validation Service (EVS) was implemented in April 2022, may be required to provide documentation even if no changes are being requested to the entity details carried over from DUNS at that time. Entity Administrators can use the Check Entity Status tool to confirm if validation was completed.*

Submit Documentation, if required

7

You may be required to provide documents that prove your entity name, physical address, start year. Use acceptable documents.

Document Name	Must be Less Than 5 Years Old?	OK for Legal Business Name and Physical Address?	OK for Start Year and State of Incorporation? (must have date)
Articles of Incorporation / Organization / Formation (if stamped as filed with an authority)	NO	YES	YES
Bank Statements (redact information that isn't necessary for validation)	YES	YES	NO
Bylaws for your company (if stamped as filed with an authority)	NO	YES	YES
Certificate of Formation / Organization (if stamped as filed with an authority)	NO	YES	YES
City Business Tax Certificate	YES	YES	NO
Department of Treasury IRS letter assigning your EIN	NO	YES	YES
Department of Treasury IRS Tax Exemption Status Letter	YES	YES	NO
"Doing-business-as" or DBA documents (if stamped as filed with an authority)	NO	YES	YES
Driver's Licence (for sole proprietors or individuals doing-business-as only; must be non-expired and have your exact name)	non-expired	YES	NO
IRS Form 8822-B or Form 990 for address change (filed only)	NO	YES	NO
IRS Forms marked as received by the IRS or processed by a CPA or e-filing software (e.g. Form 1040 with schedule C for sole proprietors)	YES	YES	YES
IRS Forms 1099 if you are the recipient (not the filer)	YES	YES	NO
Secretary of State Certificate of Filing	NO	YES	YES
Screenshot/PDF file of your business profile in your state's online business registry or Secretary of State website (must be current registration and must include the registry URL)	Within last 12 months	YES	YES
Screenshots of other websites containing your business information, including but not limited to federal websites, SAM.gov, IRS.gov, dla.CAGE.mil, etc	N/A	NO	NO
Utility Bills (water, gas, or electric only)	YES	YES	NO
W-9	N/A	NO	NO

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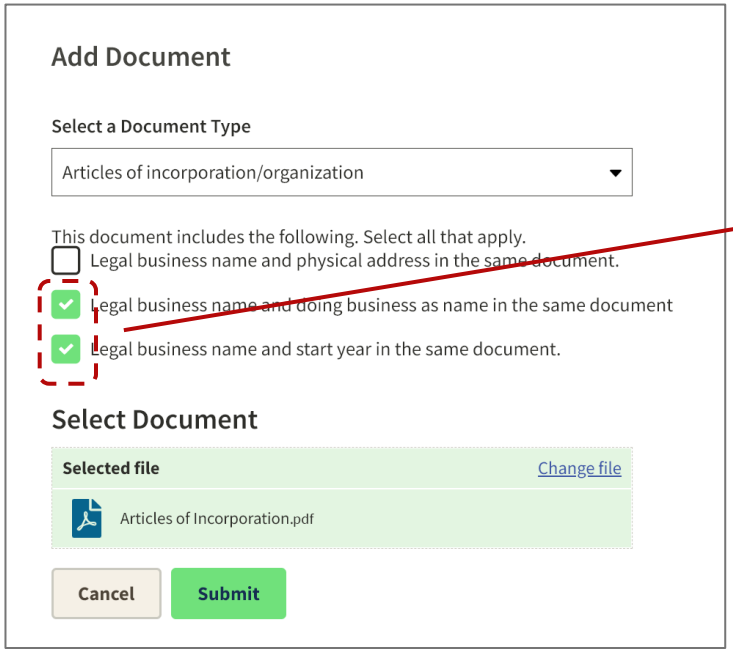
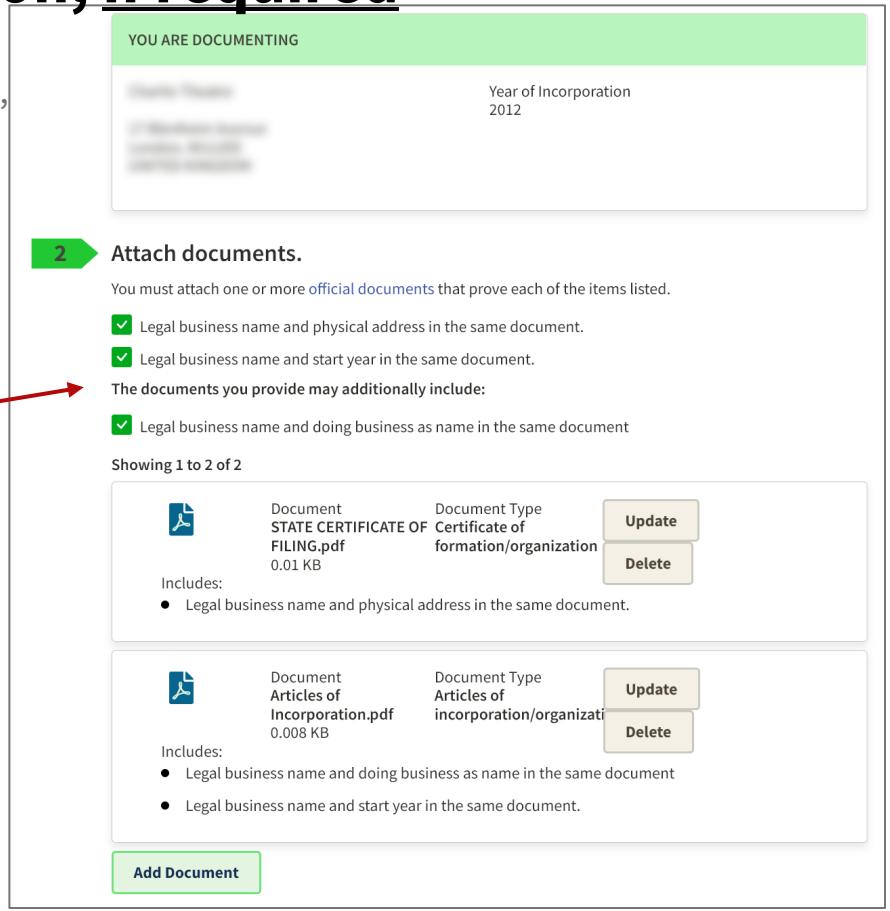
Can I Use this Document for Entity Validation? See whether a specific type of document is allowed. Also shows what not to attach. Get this comprehensive list of acceptable and unacceptable documents at FSD.gov: https://www.fsd.gov/gsafsd_sp?id=kb_article_view&sysparm_article=KB0055230

7

Submit Documentation, if required

A single document can be used for multiple requirements, **if** it contains all of the required information.





7

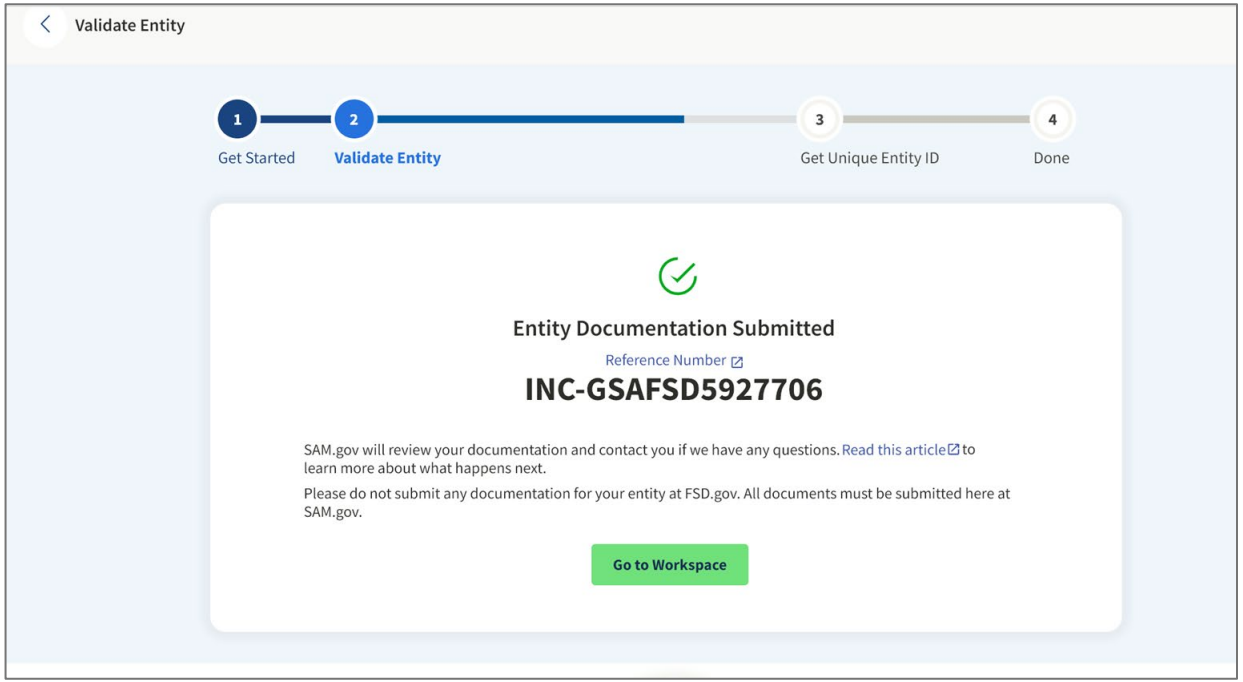
Submit Documentation, if required

Receive confirmation and wait for processing of your documents to be completed

When you submit your information, you'll be given a Federal Service Desk reference number.

You'll receive communication about the progress of your case by email from FSDsupport@gsa.gov.

Allow approx. 5 business days for processing of documents.

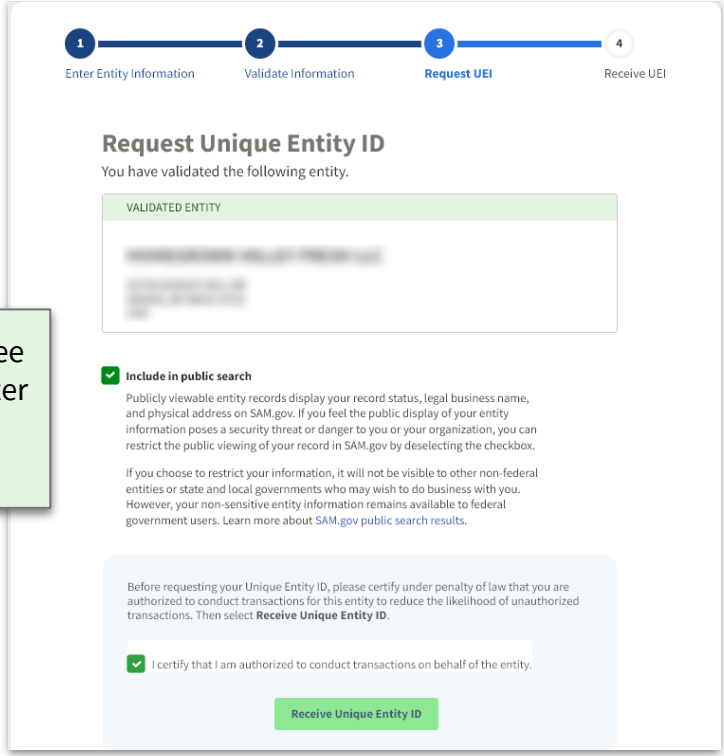


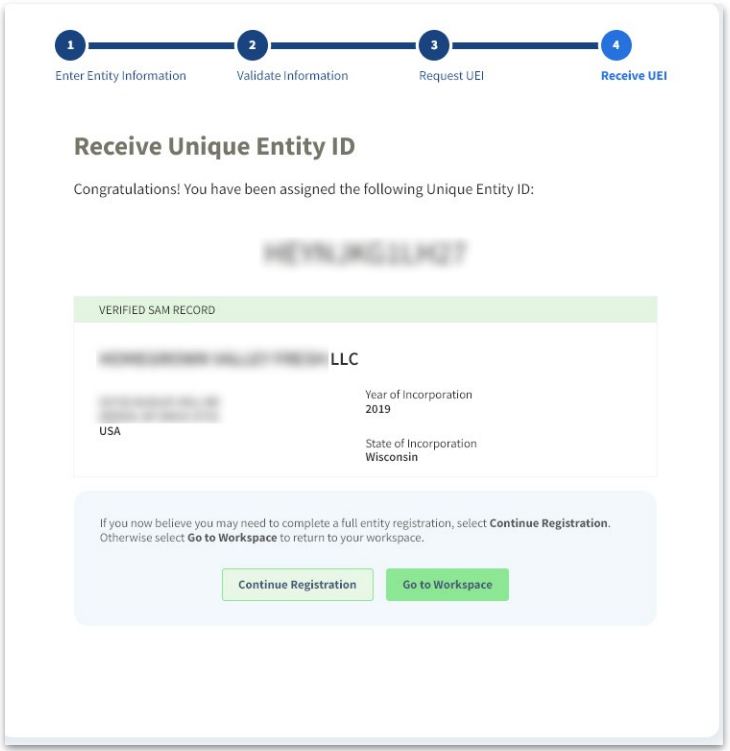
If you don't respond to a message from the validation service within five business days, the ticket will close.

8

New Entity: Receive Unique Entity ID

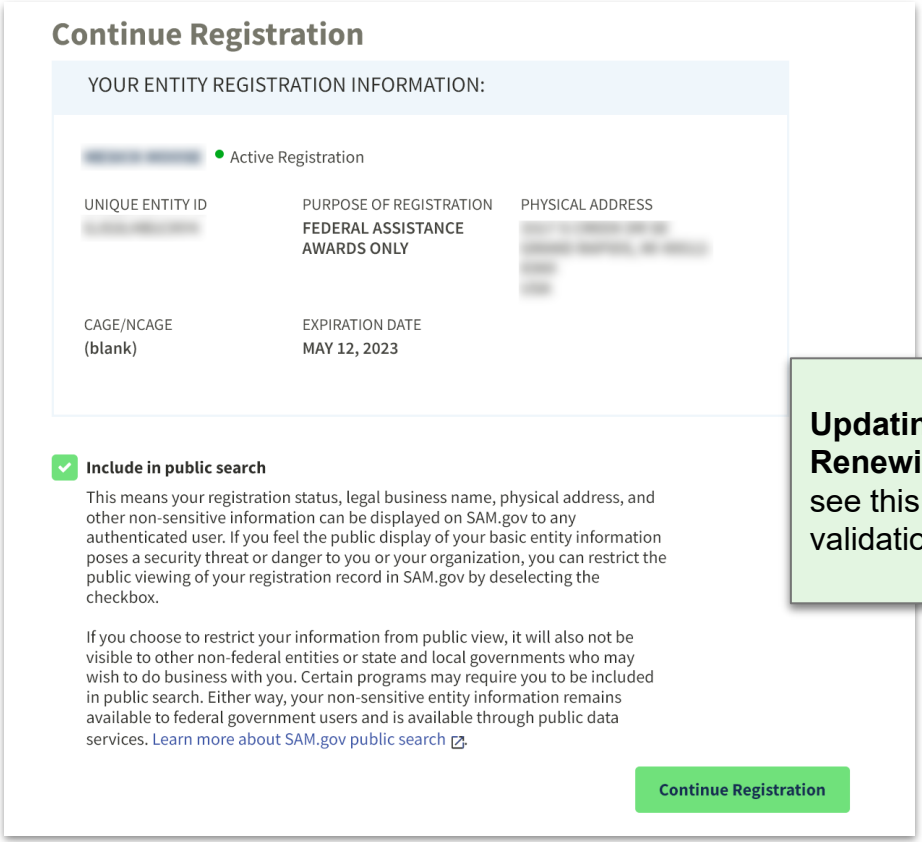
New entities will see these two pages after validation is complete.





8

Updating Entity: Continue Registration

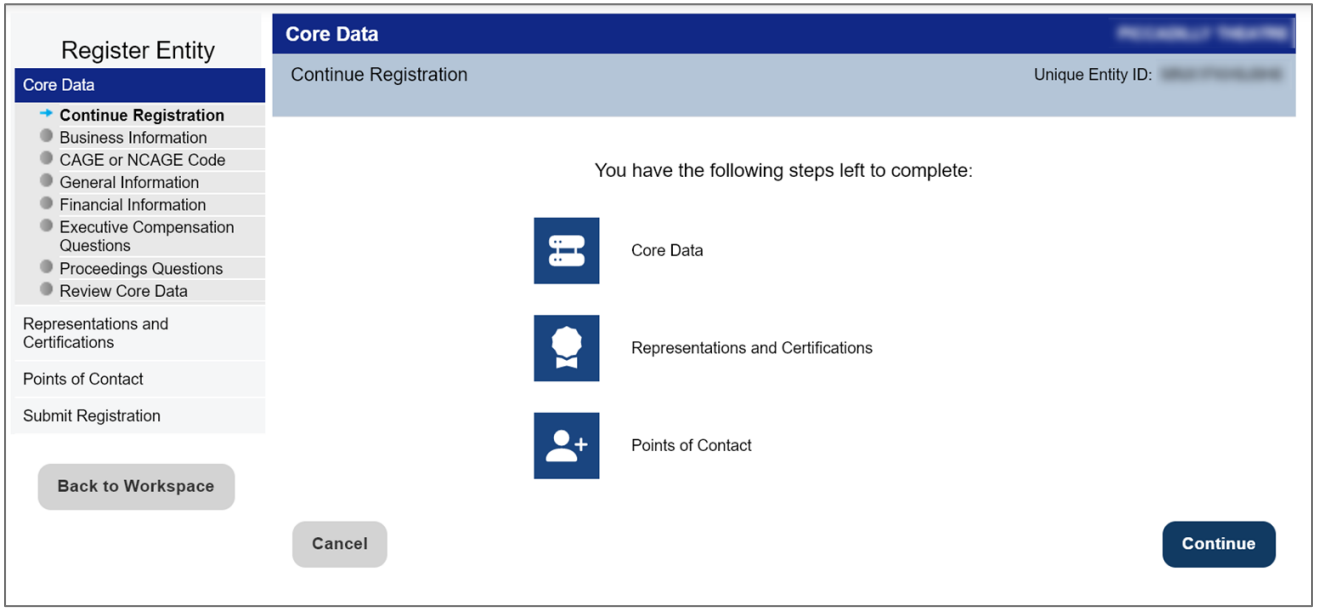


Updating or Renewing entities will see this page after validation is complete.

Continuing Registration after Validation

9 Complete Core Data, Reps & Certs, & POC Sections

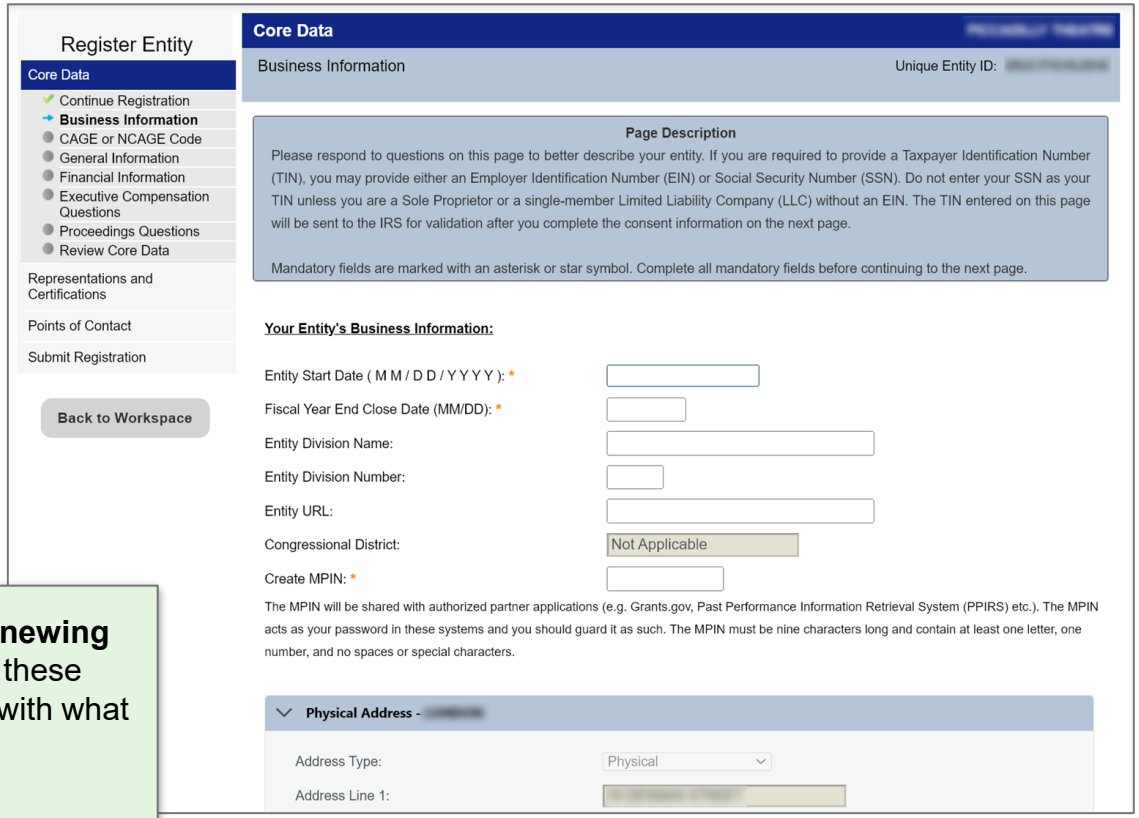
When you continue on to registration, the first page outlines the additional sections you need to complete.



9 Complete Core Data, Reps & Certs, & POC Sections

Each required field is marked with a red asterisk. The menu on the left shows the section and page you are on.

You can't jump ahead without completing each page. Once you complete a page, you can go back to a prior page.



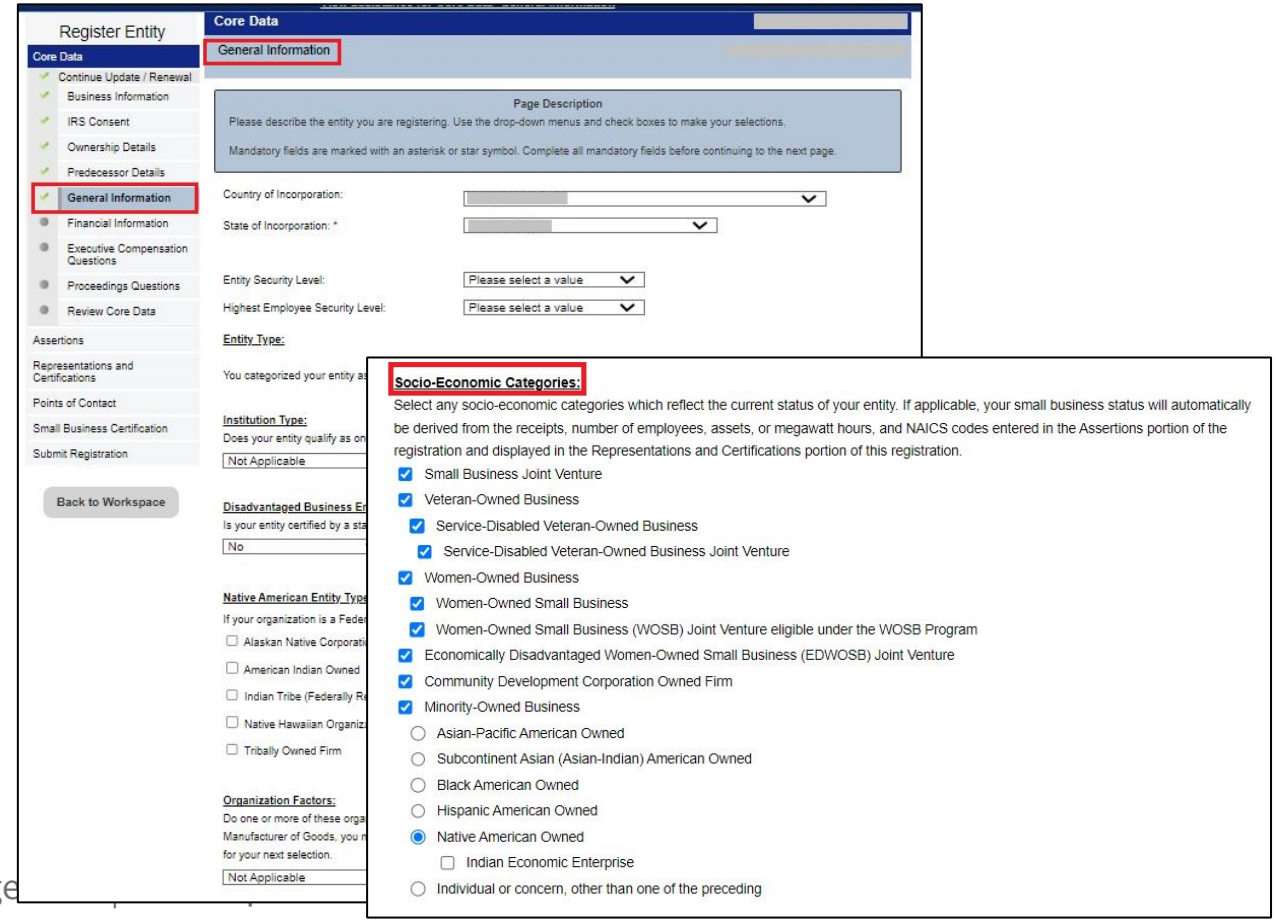
Updating or Renewing entities will see these pages pre-filled with what is on the current registration.

9 Complete Core Data, Reps & Certs, & POC Sections

Some socio-economic status categories are self-certified, and some are SBA managed certifications. See KB0067537

The socio-economic statuses on the general information page of a SAM.gov entity registration are self-selected. There is no formal certification process.

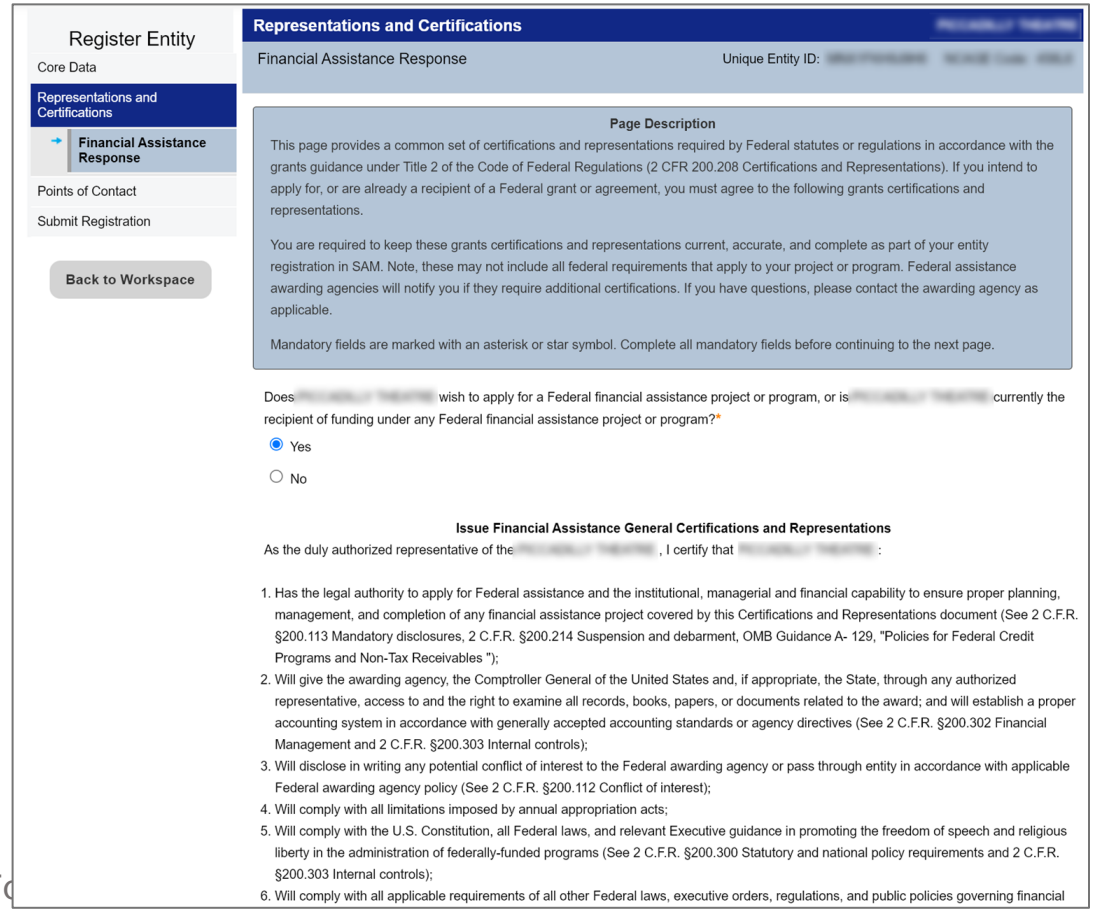
For SBA managed certifications, once you complete the registration update, the certification information is automatically retrieved from SBA.



9 Complete Core Data, Reps & Certs, & POC Sections

Representations & Certifications (Reps & Certs) for the **Financial Assistance** registration option are a single page with all the Reps & Certs in a numbered list.

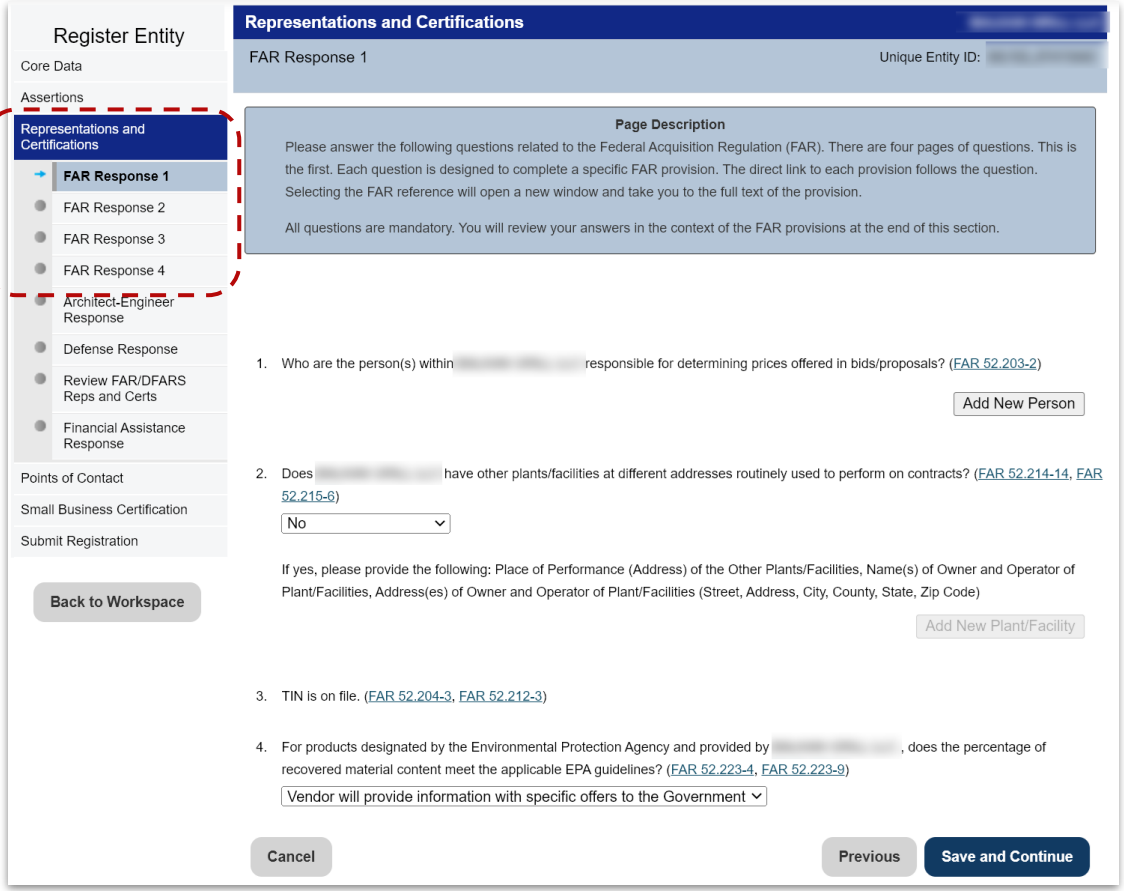
Review each one and certify at the bottom of the page.



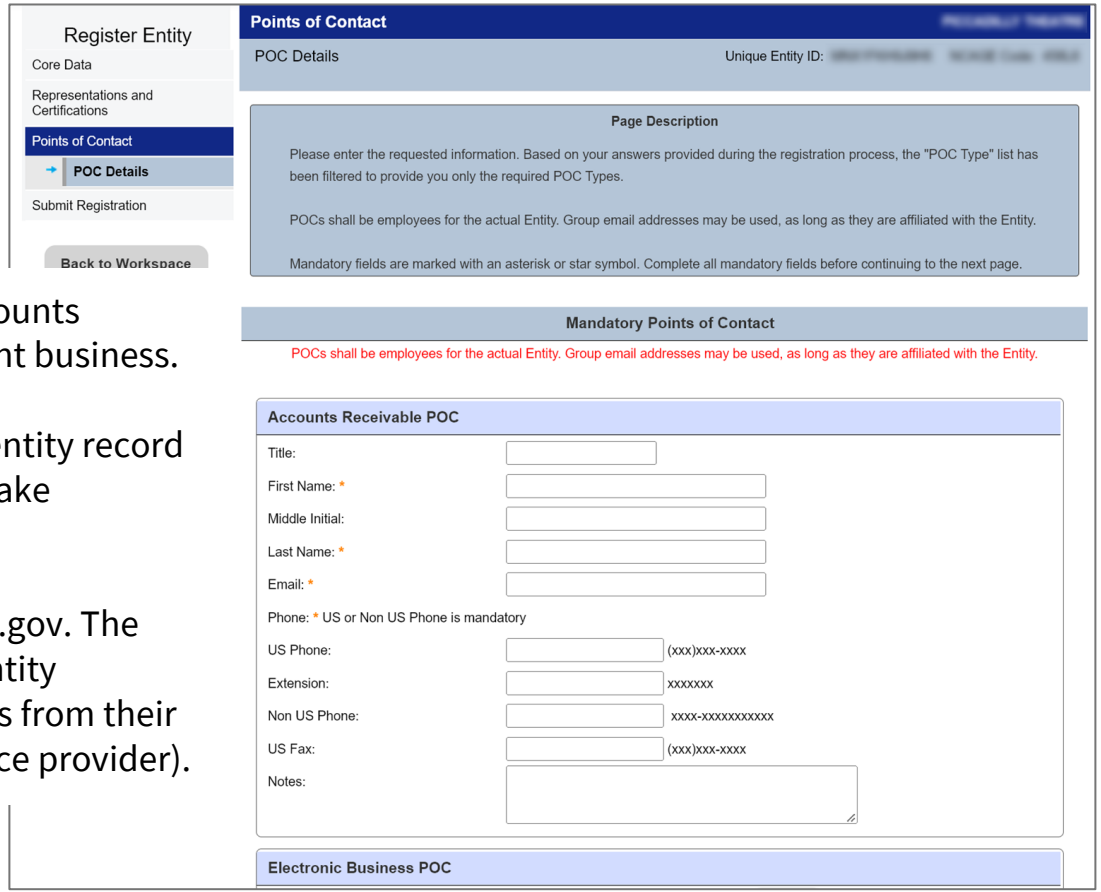
9 Complete Core Data, Reps & Certs, & POC Sections

For entities registered for **All Awards** (i.e., bidding on contracts), Reps & Certs are more that 40 questions split across four sections.

We recommend you download the registration checklist to read the questions in advance and prepare your responses.



9 Complete Core Data, Reps & Certs, & POCs Sections



Points of contact (POCs) are **required** for accounts receivable, electronic business, and government business.

Be sure to enter POCs who have access to the entity record and are authorized to answer questions and make decisions about your entity.

Adding a POC does **not** give them a role in SAM.gov. The person who first registers the entity gets the Entity Administrator role and can grant roles to others from their Workspace (unless they are a registration service provider).

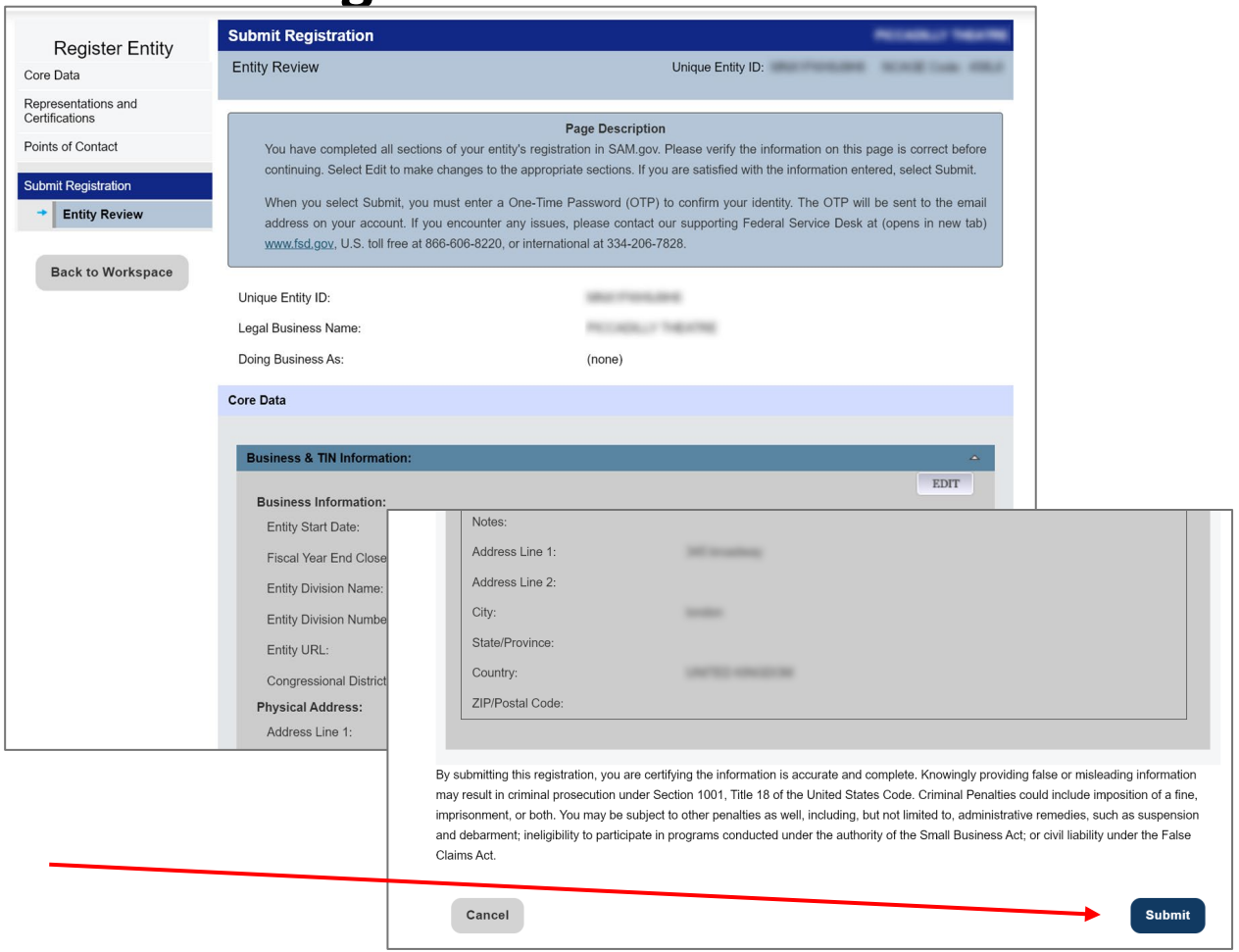
10

Submit Registration

Before you can submit your registration, the system displays a summary of what you entered in each section. Review the summary to be sure everything is correct.

Your registration is not submitted yet!

Scroll to the bottom and select “Submit.”

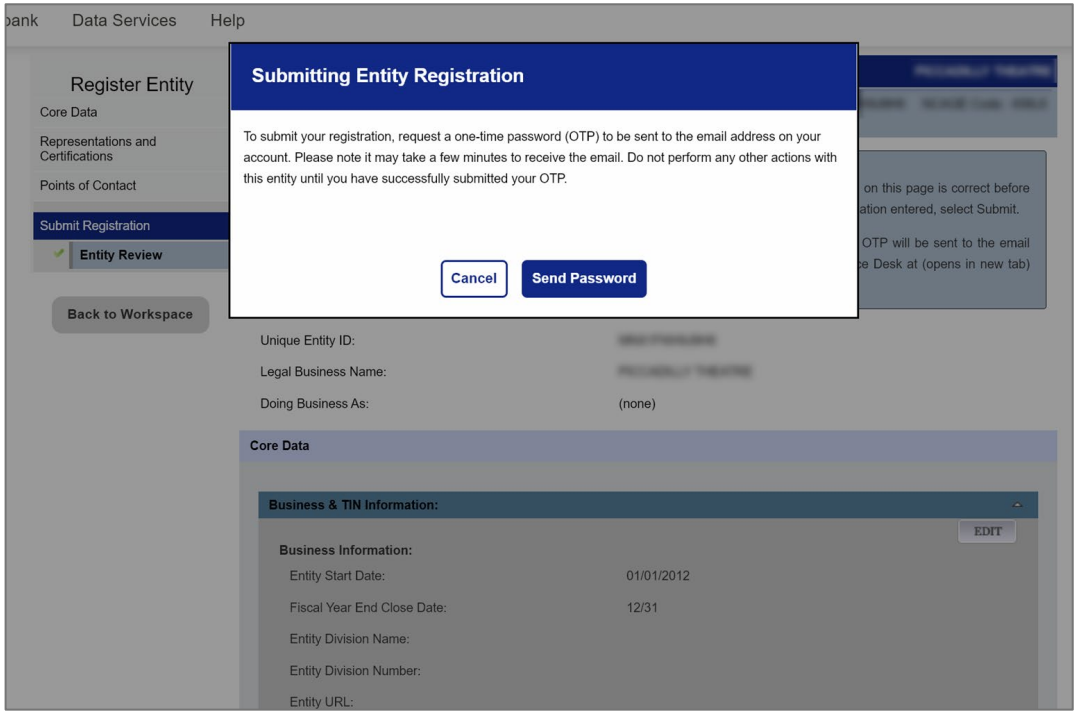


10

Submit Registration

You must enter a one-time password to complete the submission.

The password will go to your SAM.gov account email address.

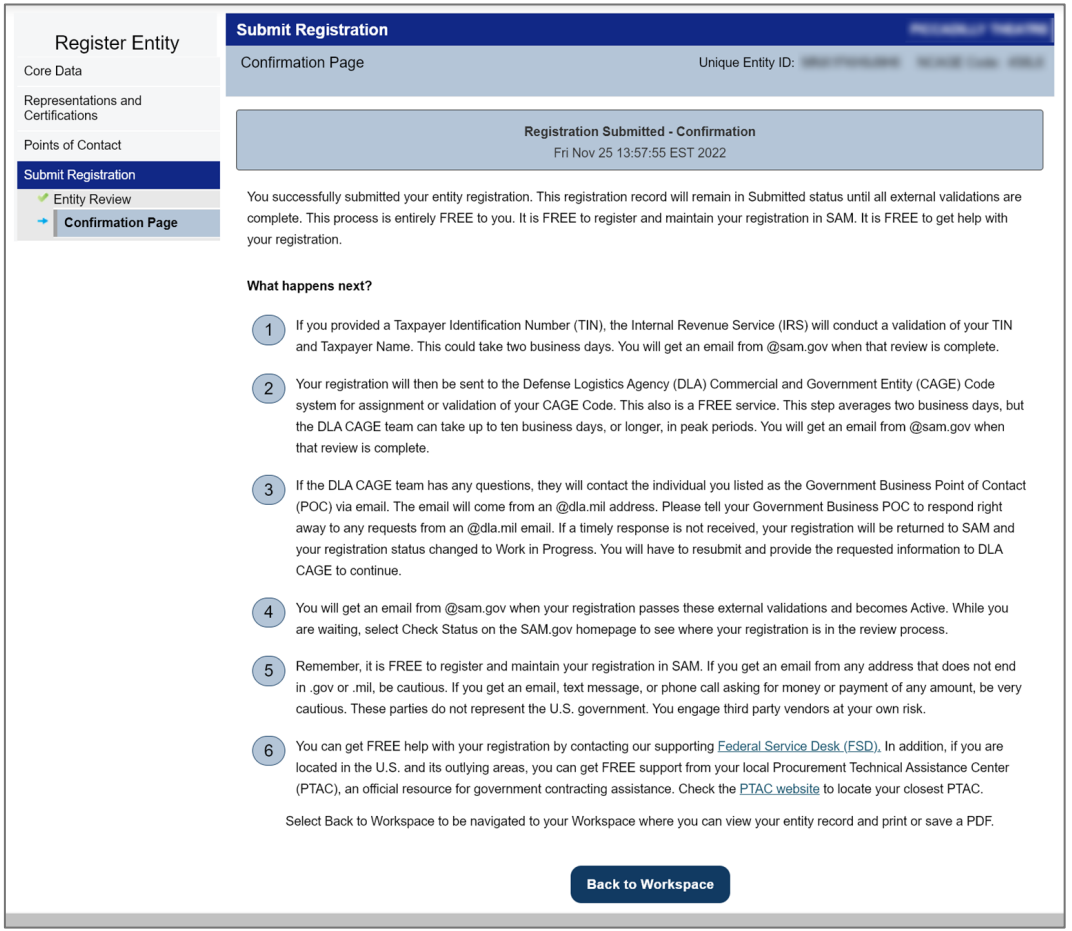


10 Submit Registration

Your registration has been successfully **submitted** when you see this page. It will read, “Registration Submitted - Confirmation” at the top.

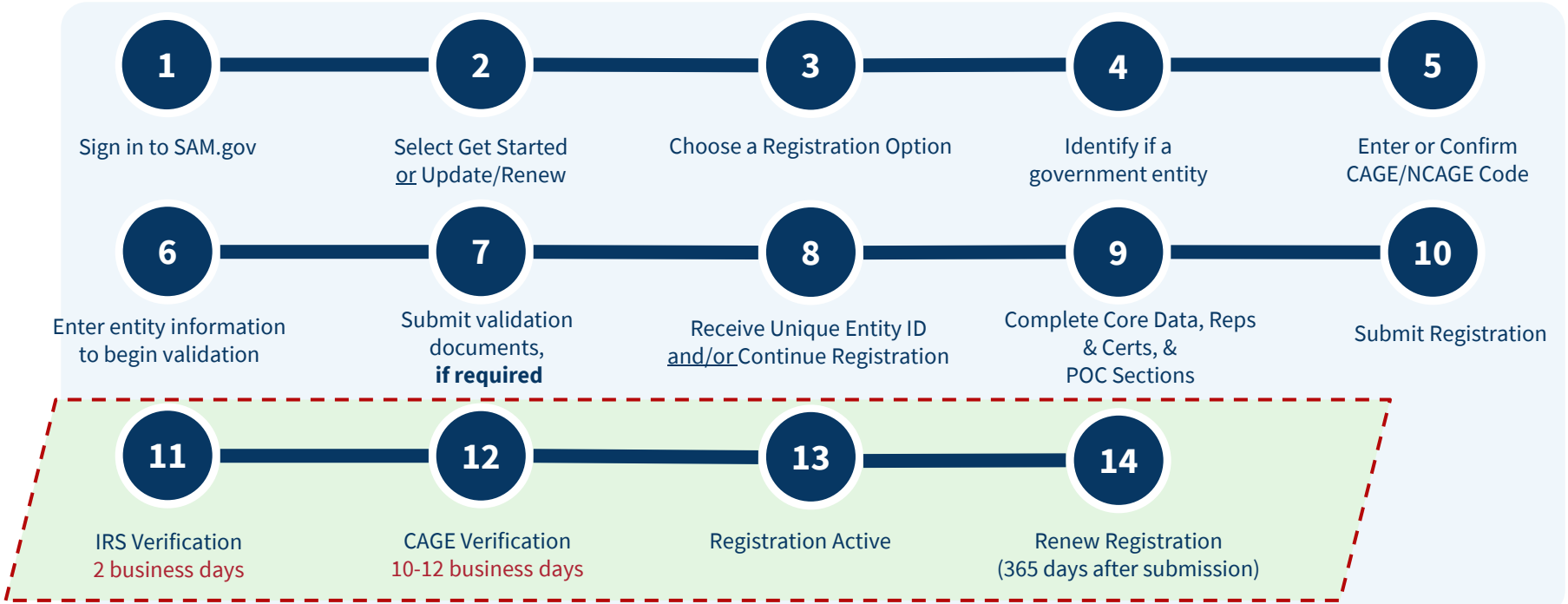
You will also receive an email confirming your entity registration was successfully submitted.

Once you submit, it can take up to 15 business days for your registration to process with the IRS and then DLA CAGE.



Required External Validations

Your entity is not considered "Registered" until your record shows a status of "Active Registration".



11

IRS Verification

- IRS is verifying the **Taxpayer Name** and the **Taxpayer Identification Number (TIN)** you entered on the Taxpayer Information Core Data of the registration (step 9).
- **TIP:** Recognize that the **Taxpayer Name** and **Legal Business Name** may not be the same. Ensure the Taxpayer Name is identical to what the IRS has on file at the time the registration is submitted even if it is different than the Legal Business Name validated for your entity.
- Compare what you entered on the SAM.gov Taxpayer Information section of the registration to the original notice you received from the IRS assigning you your EIN (Employer Identification Number) and/or your most recent federal tax return for the business activity.
- Wait for a new TIN to be uploaded to the IRS's Master File before registering in SAM.gov. It takes five weeks for the IRS to fully process a new TIN.

12

CAGE Verification

- **When registering in SAM.gov, the Legal Business Name and Physical Address must match between SAM (entity validation) & the DLA CAGE System.**
- DLA CAGE will contact the Government Business POC listed on the registration. This POC must respond to emails from DLA requesting additional information within three business days. The email will come from CAGEREVIEW@DLA.MIL.
- If a submitted registration fails at DLA CAGE it is returned and will show "**Work In Progress Registration**" status. DLA CAGE will not be able to process any CAGE updates or information unless the registration is resubmitted and back at DLA CAGE for processing.
- You can view the reason for failure using the Check Entity Status tool.

TIP: All CAGE failures do not require a correction to the Legal Business Name or Physical Address validated in SAM.gov

12

CAGE Verification, *continued*

- Questions about CAGE code requirements or problems should be directed to DLA (www.dla.mil/Customer-Support), including questions about:
  - Information about DLA's preferred formats for business name or physical address
  - Documentation DLA may request you provide (SAM.gov does not share the documentation you provide during entity validation)
  - Sources DLA may use to verify the entity information you provided during SAM.gov registration
  - Finding the CAGE code of your parent company or getting a CAGE code without being registered in SAM.gov

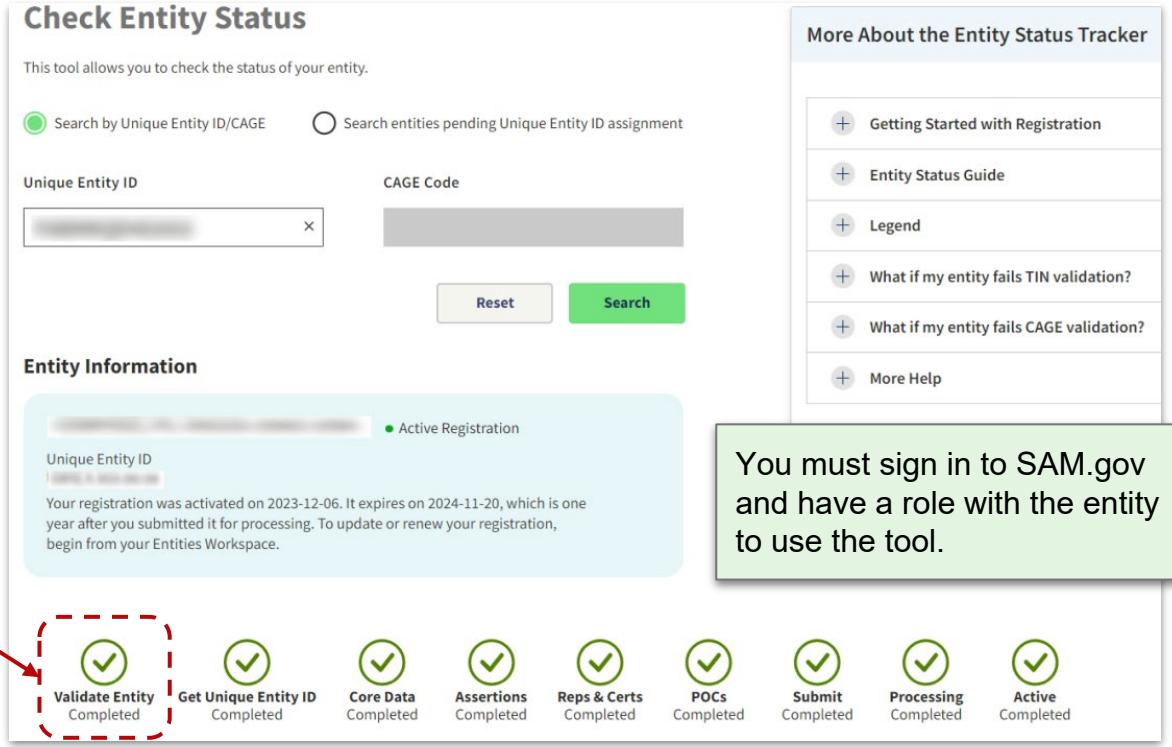
14 Renew the Registration (365 days after Submittal)

Use the **Check Entity Status** tool on the SAM.gov homepage.

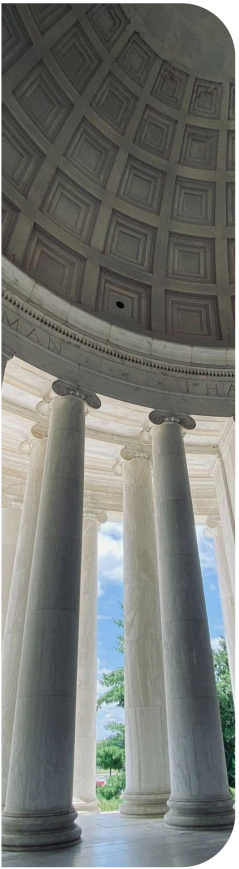
Entity Administrators get emails when a registration:

- Will expire in 60 days, 30 days, and 15 days.
- Has expired on the date of expiration.
- Has been submitted successfully for review.
- Is active.

Documents will not be required at renewal unless the business name or address you validated changes.



You must sign in to SAM.gov and have a role with the entity to use the tool.

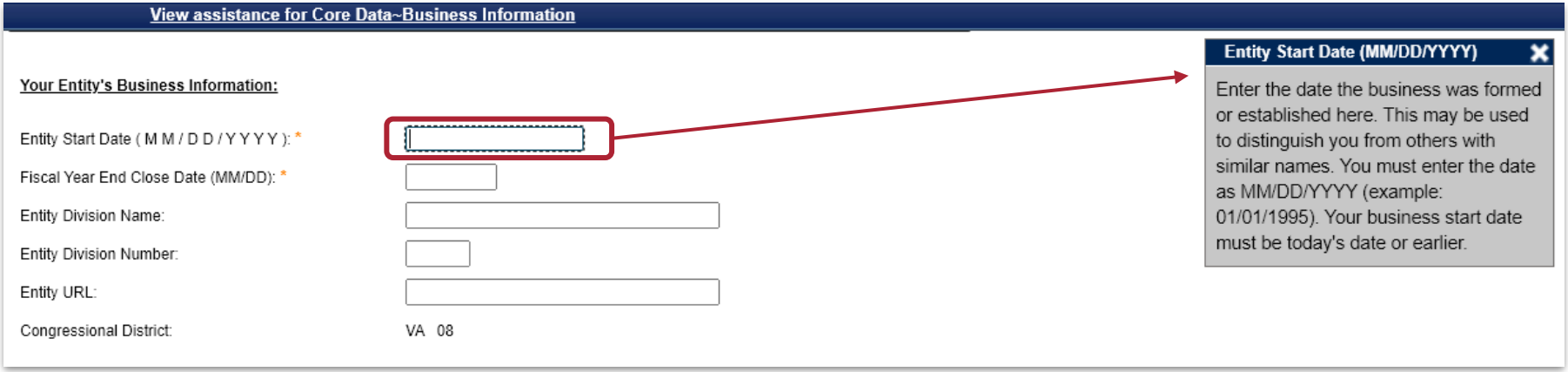


Knowledge Check Poll

- True or False. Your Legal Business Name and Taxpayer Name must match in SAM.gov.
- Which agency will assign or update your CAGE code, if required?
- As an existing registrant, how much time should I allow when updating my registration information?

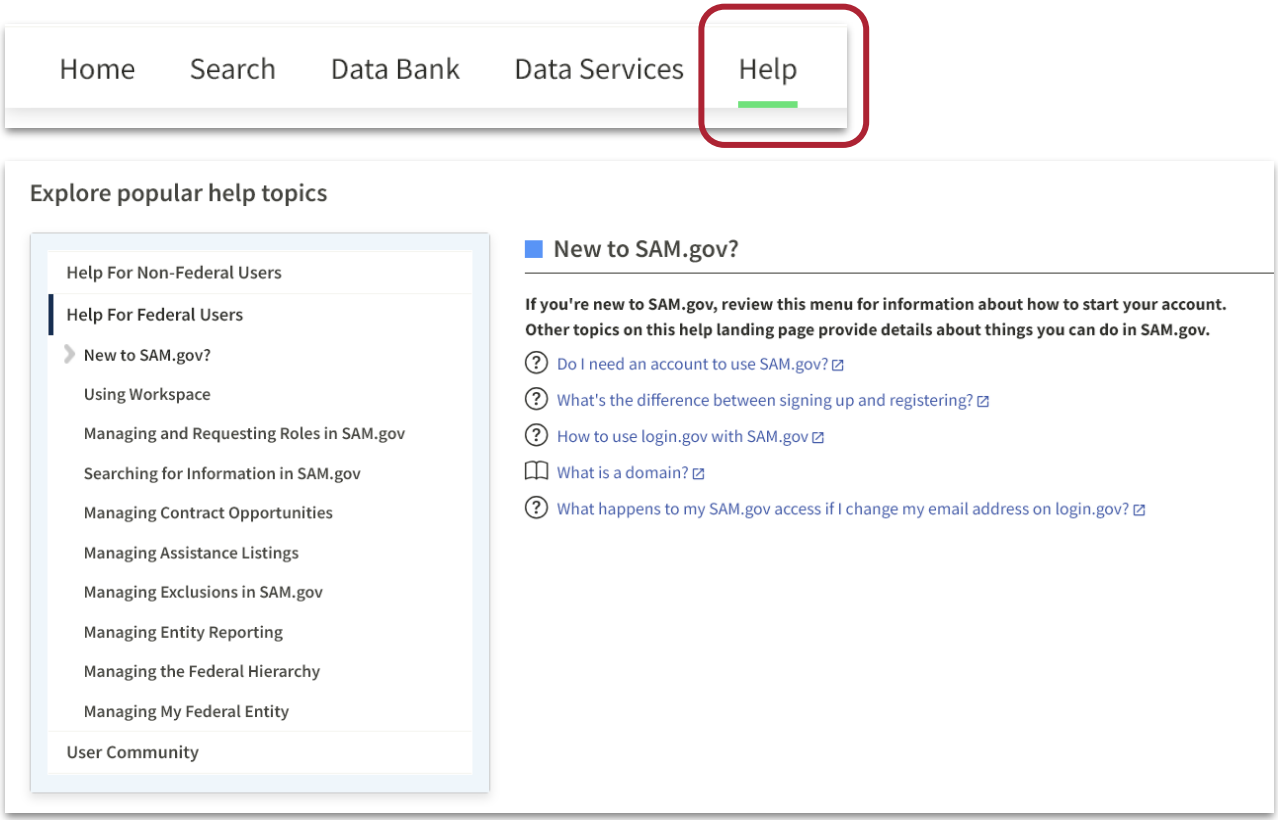
Getting Help for SAM.gov

Help in Entity Registration

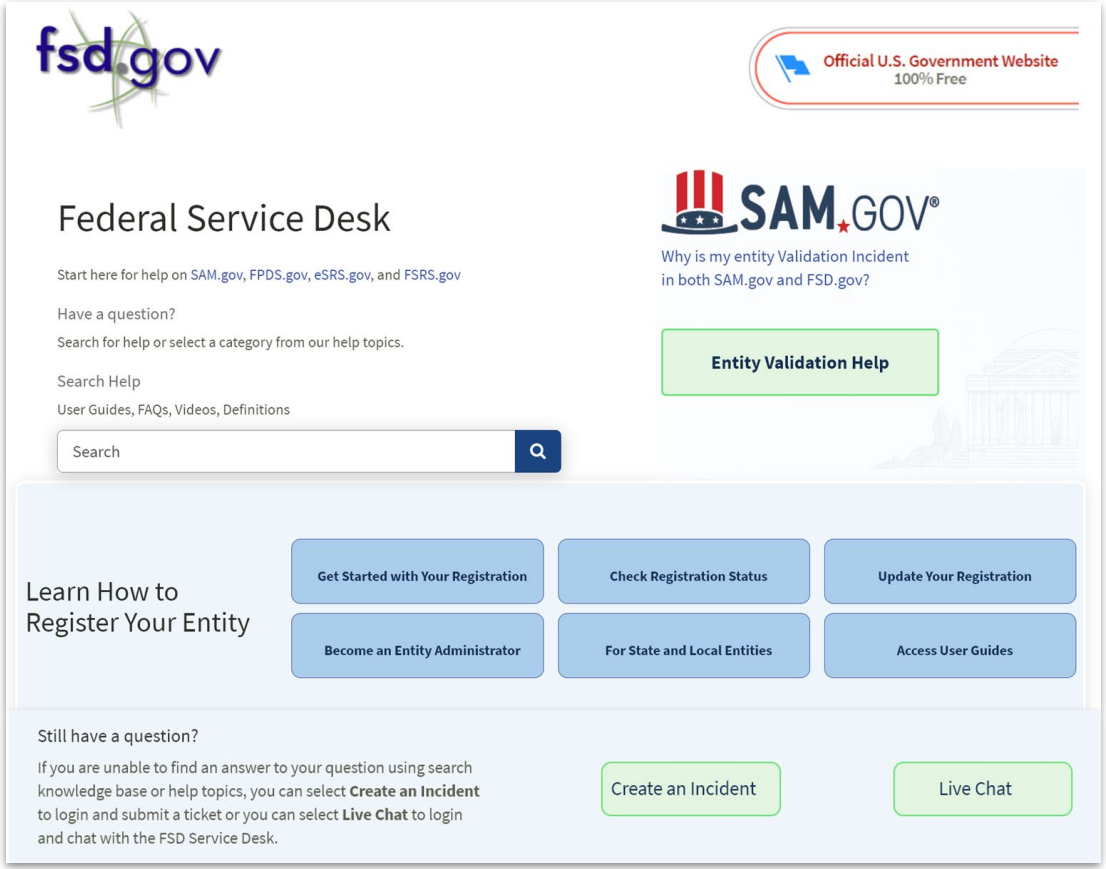


Select data entry field and a box with help pops up on the right side of the page.

Help on SAM.gov



Help at the Federal Service Desk

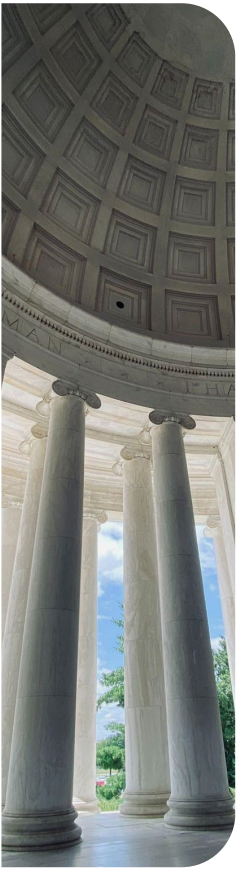


The Federal Service Desk at FSD.gov is the help desk for SAM.gov.

Our entire knowledge base for SAM.gov, and other IAE systems, is searchable here.

Enter keywords to explore help articles, videos, glossary terms, guides, and more.

Scroll down the FSD.gov home page to view more ways to get help.



Helpful Resources

Federal Service Desk (FSD.gov) - Helpdesk for SAM.gov

APEX Accelerators can provide free help with your registration, small business certifications, government contracting issues and marketing strategies.
Find your local APEX Accelerators at https://www.apexaccelerators.us

Grant applicants can get free help with applying for grants and access to other resources at Grants.gov.

Learn more about SAM.gov and IAE Systems: Visit GSA IAE's YouTube Channel:

- Video: Search for contract opportunities (8.50 Minutes)
- Video: Search for assistance listings and download the full catalog (8.52 Minutes)

Subscribe to our blog: buy.gsa.gov/interact/community/47/

Reach me and my team about today's training at **samtraining@gsa.gov**