SAM.GOV – An Integrated Award Environment (IAE)

Preparation and Registration

Billy Grill
Ohio University PTAC
2642 Indian Ripple Rd
Dayton, OH 45440-4503

bgrill@ohio.edu
Office: (937) 230-9896
Mobile: (410) 320-9018
https://ptac.ohio.edu/

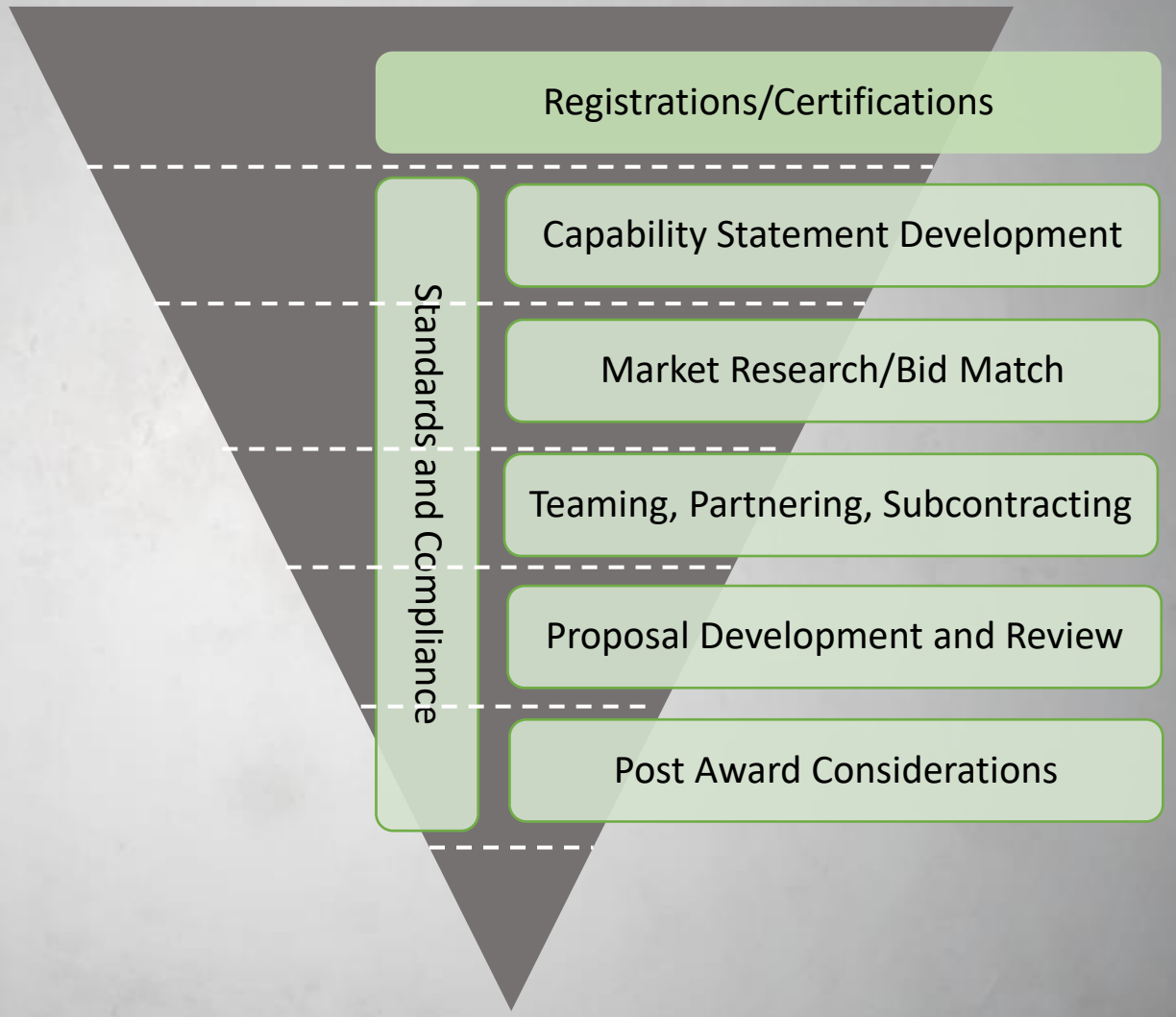
What We Are Covering

- What is the IAE
- Preparing for SAM Entity Registration
  - Unique Entity ID
  - Core Data
  - Assertions
  - Reps & Certs
  - Architect and Engineering Responses
  - Defense FAR Supplement (DFARS) questionnaire (if applicable)
  - Points of Contact (POCs)
  - SBA supplemental page (If you are a small business)
- Help and Resources

Mission

- PTAC works with businesses (clients) to train them in the pursuit of prime **government** contracts or subcontracts
  - Not grants or B2B
- Client appointments – guidance, advice, answer questions
- Group training events
- Bid matching services tailored to your business
- Access to research results from a market intelligence tool
- PTAC services are **FREE** to our clients*
- * Some training events may require a fee to defray expenses of the event (i.e. facility rental, etc.)

PTAC Services

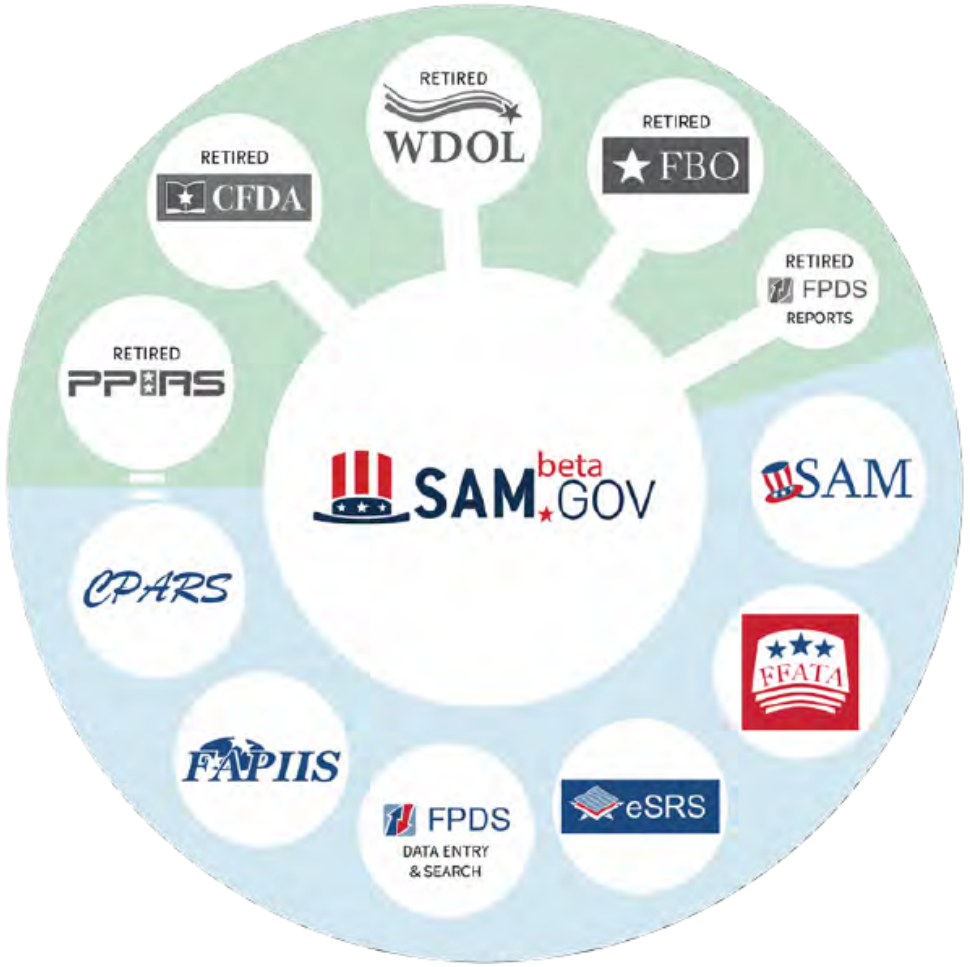


What is IAE

The IAE Systems*

- **beta.SAM.gov**
- **SAM** - System for Award Management
- **CPARS** - Contractor Performance Assessment Reporting System
- **eSRS** - Electronic Subcontracting Reporting System
- **FAPIIS** - Federal Awardee Performance and Integrity Information System
- **FSRS** - Federal Funding Accountability and Transparency Act (FFATA) Subaward Reporting System
- **FPDS** - Federal Procurement Data System

**IAE also manages the Federal Service Desk*



Source: https://interact.gsa.gov/document/recap-iae-stakeholder-forum-may-5-2021-all-you-need-know-about-samgov-integration?utm_medium=email&utm_source=govDelivery

Preparing for Entity Registration

- Login.Gov Credentials
- Notarized Entity Administrator Letter
- Business Documents
- Banking Information
- NAICS/PSC Codes
- POCs

Purpose of Registration

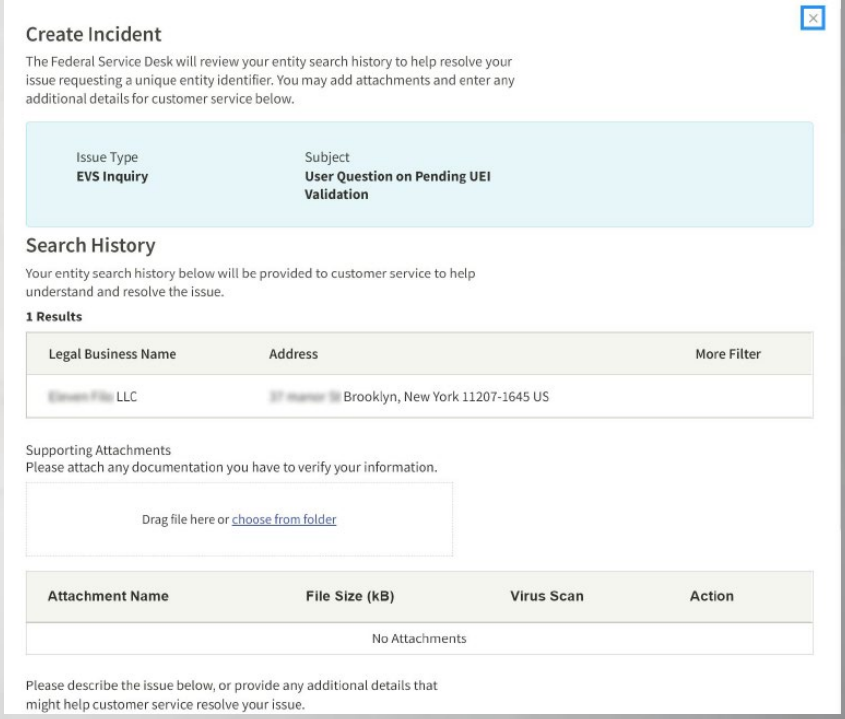
For **All Awards registrations**, prepare these sections:	For **Financial Assistance Awards Only registrations**, prepare these sections:
• Unique Entity ID • Core Data • Assertions • Reps & Certs • Architect and Engineering Responses • Defense FAR Supplement (DFARS) questionnaire (if applicable) • Points of Contact (POCs) • SBA supplemental page (If you are a small business)	• Unique Entity ID • Core Data • Reps & Certs • Points of Contact (POCs)

Unique Entity ID

- Legal Business Name
- Physical Address (PO Boxes May Not Be Used)
- Date of Incorporation
- State of Incorporation
- Your information will be validated by SAM.Gov, if your information cannot be validated you must create an incident…..

Incident Validation Documents

- To validate your legal business name:
  - Certificate/Articles of Organization or Incorporation
  - Operating Agreements
  - Doing Business As Documentation
  - Company Bylaws
  - Stock Ownership
  - Share Certificates
- To validate your physical address:
  - Utility Bills
  - Bank Statement
  - Employer Identification Number Documentation
  - Tax Returns/Filings
- To validate your date or state of incorporation:
  - Certificate/Articles of Organization or Incorporation
  - Certificate/Articles of Formation
- To validate your national identifier (non-U.S. entities only):
  - Employer Identification Number Documentation
  - Tax Identification Documents
  - Tax Returns/FilingsREDACT YOUR DOCUMENTS



Core Data Section

- Organization Start Date
- Fiscal Year End
- Organization's Website
- Marketing Partner Identification Number (MPIN) (WRITE THIS DOWN)
- Physical Address (Copied from UEI)
- Mailing Address
- Taxpayer ID Number (TIN)

Core Data Continued

- IRS Consent Form
  - Taxpayer Name and Address
- CAGE/NCAGE Code
  - You won't have this if it is your first time registering
- Ownership Details
- Predecessor Details
- General Info
  - Includes Socio Economic Categories
- Financial Info
  - Banking, Account, Routing, ACH
- Executive Compensation
  - <80% of Income from Fed Sources
  - < $25 million
- Proceedings

Assertions

- Goods and Services
  - NAICS/PSC Codes
- Size Metrics
- Electronic Data Interchange
- Disaster Response Registry
  - Bonding
  - Geography

Reps and Certs

- FAR Responses 1-4
- Architect Engineer Response
- Defense Response
  - Do you wish to bid on defense contracts
- Financial Assistance Response

Points of Contact

- Mandatory POCs
  - Accounts Receivable
  - Electronic Business
  - Government Business
- Optional POCs
  - Past Performance
  - Alternate POCs
  - Optional POCs as needed

Small Business Association (SBA) Profile

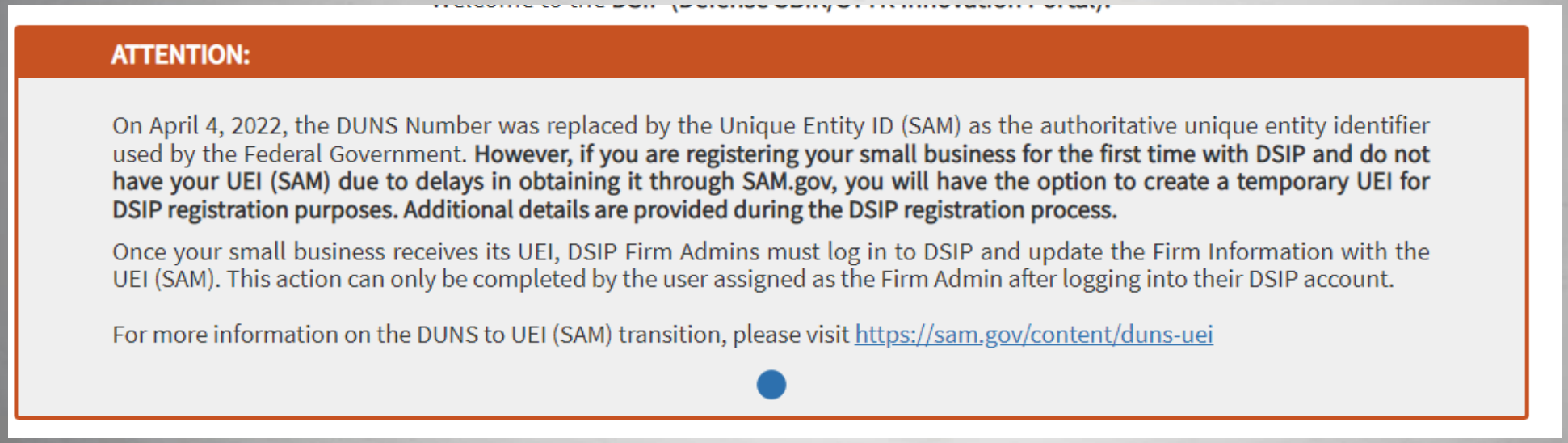
- SBA's Dynamic Small Business Search
- Online Capability Statement
- Best Practice to Fill Out
- GLS Instructions

Changes

- **Will I get a CAGE code when I register my entity in SAM.gov?**
- Effective October 21, 2021, certain entities registering in SAM.gov will not be assigned a CAGE code during the registration process.

- Entities that will not require a CAGE code after Oct. 21, 2021 are ones that meet the following criteria:
- Purpose of registration is financial assistance only (Z1)
- The country in the entity's physical address is the United States
- Business type is not one of the following:
    - Federal Government (2R)
    - State Government (2F)
    - Local Government (12)
    - Tribal Government (3I)
    - Foreign Government (CY)
    - Foreign Owned (20)
    - Manufacturer of Goods (MF)
    - Educational Institution (M8)

Changes (DSIP)

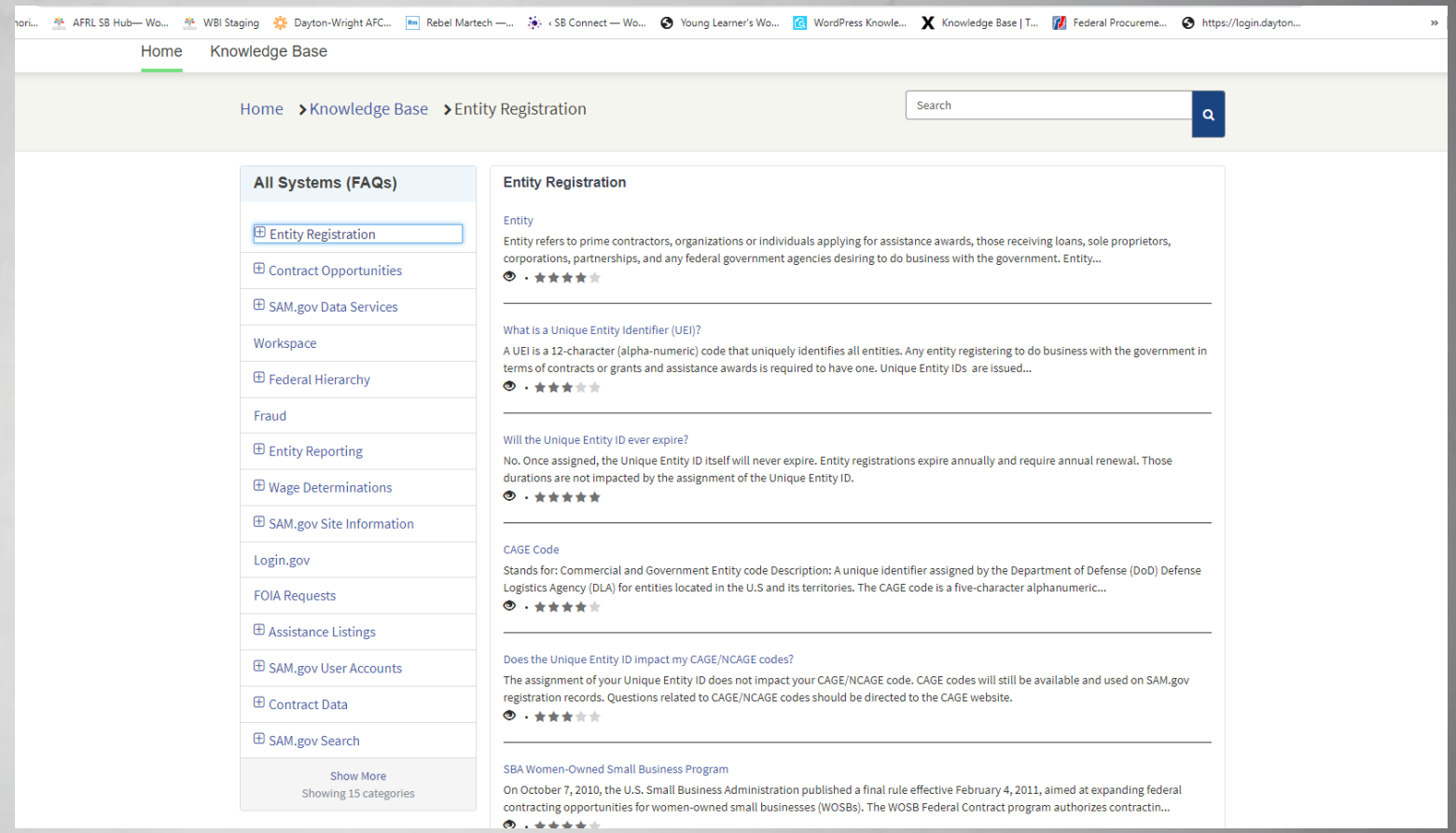


Best Practices

- Have all of your documentation ready
- Be familiar with your FAR/DFAR responses
- Read through the SAM Registration Guide
- Contact your local PTAC for assistance

Help and Resources

- FSD Knowledgebase
  - Entity Registration
  - Contract Opportunities
  - SAM.Gov Data Services
  - Workspace
  - Federal Hierarchy
  - Fraud
  - Entity Reporting
  - Wage Determinations
  - Sam.Gov Site Information
  - Login.Gov
  - FOIA Requests
  - Assistance Listings
  - SAM.Gov User Accounts
  - Contract Data
  - SAM.Gov Search



Questions?

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Program Overview
• EDGE is a contracting assistance program designed to assist socially and economically disadvantaged businesses in Ohio.
• Created by Executive Order 2002-17T - December 2002. Became ORC 123.152 on July 1, 2003.
• It establishes goals for state agencies for direct purchases and contract awards.
Ohio