

# SAM.GOV – An Integrated Award Environment (IAE)

Preparation and Registration

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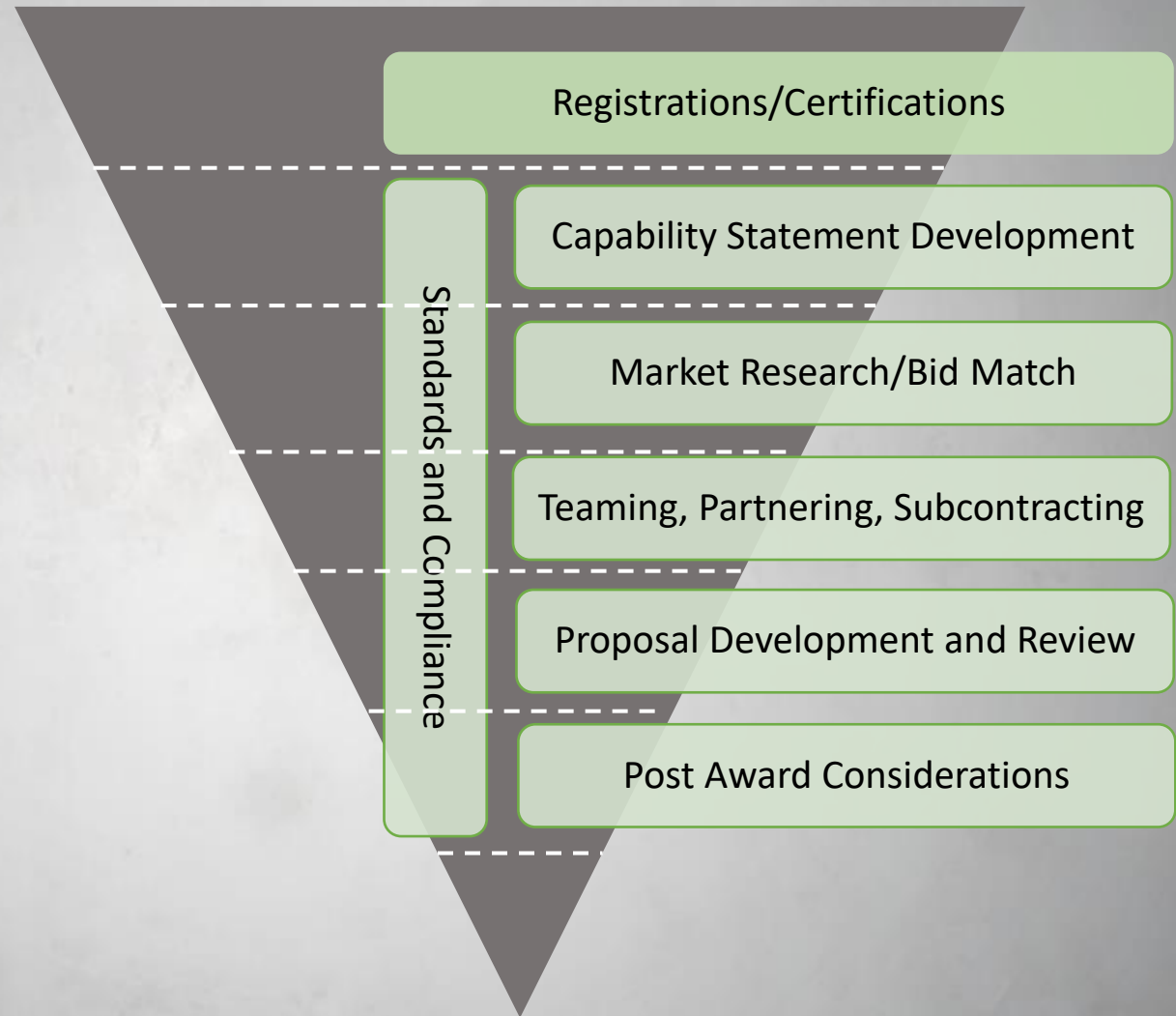
# What We Are Covering

- 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



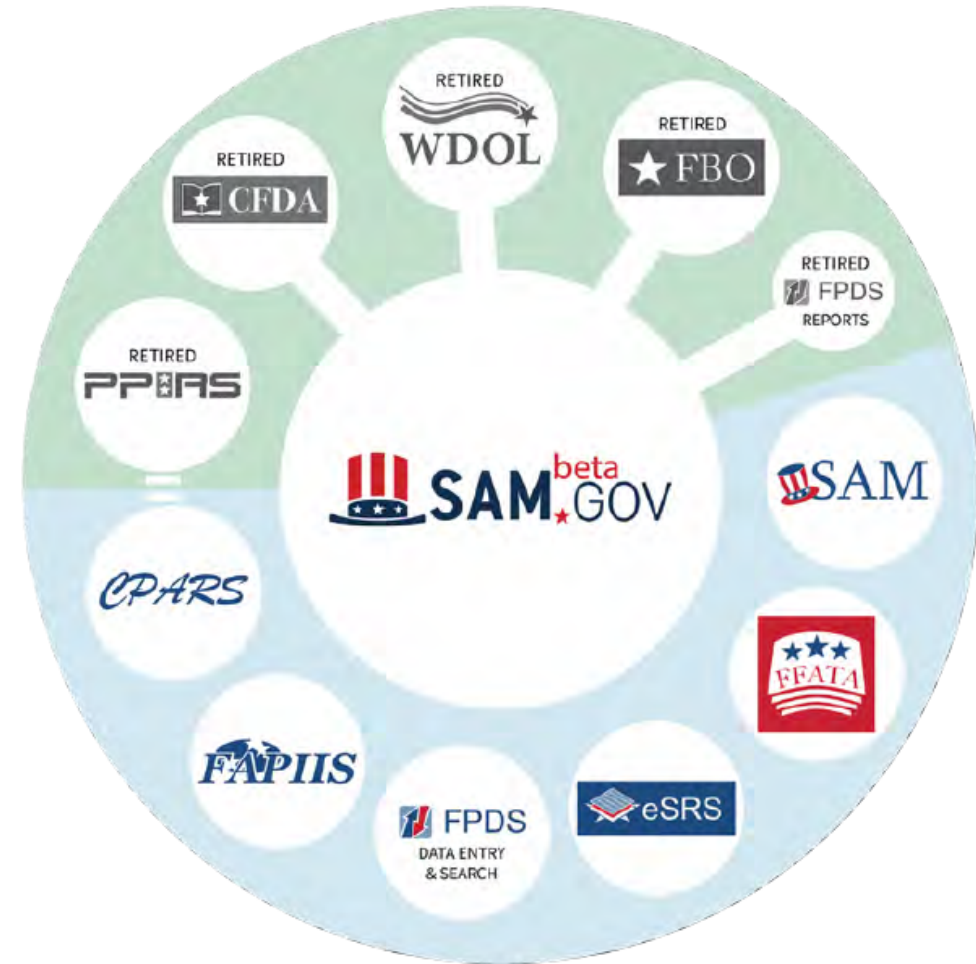
# What is IAE



## The IAE Systems\*

- **beta.SAM.gov**
- **SAM** - System for Award Management
- **CPARS** - Contractor Performance Assessment Reporting System
- **eSRS** - Electronic Subcontracting Reporting System
- **FAPIS** - 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](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 <b>All Awards registrations</b> , prepare these sections:	For <b>Financial Assistance Awards Only registrations</b> , prepare these sections:
<ul style="list-style-type: none"><li>● Unique Entity ID</li><li>● Core Data</li><li>● Assertions</li><li>● Reps &amp; Certs</li><li>● Architect and Engineering Responses</li><li>● Defense FAR Supplement (DFARS) questionnaire (if applicable)</li><li>● Points of Contact (POCs)</li><li>● SBA supplemental page (If you are a small business)</li></ul>	<ul style="list-style-type: none"><li>● Unique Entity ID</li><li>● Core Data</li><li>● Reps &amp; Certs</li><li>● Points of Contact (POCs)</li></ul>

# 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 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/Filings **REDACT YOUR DOCUMENTS**
- To validate your physical address:
  - Utility Bills
  - Bank Statement
  - Employer Identification Number Documentation
  - Tax Returns/Filings

✕

### Create Incident

The Federal Service Desk will review your entity search history to help resolve your issue requesting a unique entity identifier. You may add attachments and enter any additional details for customer service below.

<b>Issue Type</b> EVS Inquiry	<b>Subject</b> User Question on Pending UEI Validation
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#### Search History

Your entity search history below will be provided to customer service to help understand and resolve the issue.

**1 Results**

Legal Business Name	Address	More Filter
Green LLC	Brooklyn, New York 11207-1645 US	

Supporting Attachments  
Please attach any documentation you have to verify your information.

Drag file here or [choose from folder](#)

Attachment Name	File Size (kB)	Virus Scan	Action
No Attachments			

Please describe the issue below, or provide any additional details that might help customer service resolve your issue.

# 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)

## ATTENTION:

On April 4, 2022, the DUNS Number was replaced by the Unique Entity ID (SAM) as the authoritative unique entity identifier used by the Federal Government. **However, if you are registering your small business for the first time with DSIP and do not have your UEI (SAM) due to delays in obtaining it through SAM.gov, you will have the option to create a temporary UEI for DSIP registration purposes. Additional details are provided during the DSIP registration process.**

Once your small business receives its UEI, DSIP Firm Admins must log in to DSIP and update the Firm Information with the UEI (SAM). This action can only be completed by the user assigned as the Firm Admin after logging into their DSIP account.

For more information on the DUNS to UEI (SAM) transition, please visit <https://sam.gov/content/duns-uei>



# 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

The screenshot displays the FSD Knowledgebase website. The browser's address bar shows the URL <https://login.dayton...>. The page title is "Knowledge Base". The breadcrumb navigation is "Home > Knowledge Base > Entity Registration". A search bar is located in the top right corner. On the left side, there is a sidebar titled "All Systems (FAQs)" with a list of categories: Entity Registration (selected), 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, and SAM.gov Search. Below the list is a "Show More" button indicating "Showing 15 categories". The main content area is titled "Entity Registration" and contains several sections: "Entity" (definition and rating), "What is a Unique Entity Identifier (UEI)?" (definition and rating), "Will the Unique Entity ID ever expire?" (answer and rating), "CAGE Code" (definition and rating), "Does the Unique Entity ID impact my CAGE/NCAGE codes?" (answer and rating), and "SBA Women-Owned Small Business Program" (description and rating).

# Questions?

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## Program Overview

- EDOE is a contracting assistance program designed to assist socially and economically disadvantaged businesses in Ohio.
- Created by Executive Order 2002-177 - December 2002. Became OAC 123.132 on July 1, 2003.
- It establishes goals for state agencies for direct purchases and contract awards.

