

System for Award Management (SAM) Quick Guide

READ THIS FIRST!

Last updated: Feb 2018

1. An active SAM registration is required in order to be awarded a contract with the Federal government and to be paid for work performed.
2. Registration is FREE at www.sam.gov. Due to IRS and CAGE validation, it will take 3-5 business days for your registration to become active after submittal. Beware of imposter sites or companies that will complete your registration for a fee. **We recommend using Mozilla Firefox or Google Chrome. Avoid using Internet Explorer versions before IE11.**
3. You are required to have a DUNS number to register with SAM. If you already have a DUNS number and need to update information on file with Dun and Bradstreet, do so at least 24 hours prior to updating information in SAM.
4. You are required to have a Tax Identification Number (TIN or EIN) in order to register a business.
5. Your business is referred to as an “entity” by SAM.
6. If your SAM/CCR profile is/was linked to an email address that is no longer active within your company, you must contact the Federal Help Desk.
7. Once your registration is active, you will likely be contacted by vendors attempting to sell you services related to government contracting (consultants, etc). **Many are unnecessary and some may be scams.**
8. Completing a SAM registration can take as long as an hour or more. We suggest you gather your information ahead of time (such as DUNS, banking info, EIN/TIN, gross receipts total, no. of employees.)
9. SAM took the place of CCR in 2012. If you used to be registered as a federal contractor in CCR but have never been registered in SAM there are some additional steps you have to take. Reference Section Three for Migrating a Legacy Account for instructions.
10. This is only a quick guide. If you have additional questions or need help...

Washington PTAC is here!

Visit www.washingtonptac.org to find the center nearest you.

Outside of Washington? Visit aptac.org for locations nationwide

LET'S GET STARTED!

WHAT TYPE OF REGISTRATION ARE YOU DOING?

If you need to create a NEW SAM profile and have NEVER been registered in SAM

[REFER TO SECTION ONE](#)

If your SAM is now EXPIRED or you wish to UPDATE your current SAM

[REFER TO SECTION TWO](#)

If you have to MIGRATE your old CCR profile into your SAM registration

[REFER TO SECTION THREE](#)

Need Additional Help??

See the "Help" Section of SAM for Quick and Full User Guides and Demonstration Videos

Federal Service Desk: For technical issues with SAM www.fsd.gov 866.606.8220

SECTION ONE: SETTING UP A NEW ACCOUNT

BEFORE YOU START

You will need the following:

1. A DUNS number or make sure your D&B account is current

Dun & Bradstreet: 866.705.5711

To obtain a DUNS or make changes <http://fedgov.dnb.com/webform>

2. Your taxpayer identification number (TIN) and the taxpayer name associated with that taxpayer number. Review your tax documents from the IRS (such as 1099 or W2 form).

IRS: To obtain a Tax Identification Number www.irs.gov

3. Your bank account routing number, your bank account number, and bank account type.

4. Your NAICS codes

To find your **NAICS** codes: <https://www.census.gov/eos/www/naics/>

5. A notarized letter declaring a entity administrator.

And if you are working in a PTAC center to register.....

6. Bring any relevant usernames and passwords
7. Be able to retrieve emails from your phone or our computer

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

Account Registration

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).

Create an Account

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.

Create System Account

HOME | SEARCH RECORDS | DATA ACCESS | CHECK STATUS | ABOUT | HELP

Create Account: Individual

- ▶ User Information
- ▶ Summary

Create Individual Account

User Information

Page Description

Create your individual user account in SAM by entering the following information. You will review this information on the next page before you submit your user account creation request.

Mandatory fields are marked with an asterisk or star symbol. Complete all mandatory fields before continuing to the next page.

User Data:

First Name: *

Last Name: *

Email Address: *

Confirm Email Address: *

Phone: * (xxx)xxx-xxxx

Primary Communication: Phone Email

You will now create your log on information.

KEEP THIS IN A SAFE PLACE!

If you are migrating an old account, see your PTAC counselor.

MY SAM SEARCH RECORDS DATA ACCESS ABOUT HELP

MY SAM

My User Roles

Entity Users

Entity Registrations

Existing Entity Registrations

Register New Entity

BioPreferred Reporting

My Account Settings

My Data Access

General

Welcome

Welcome to your My SAM page. Start here to learn what you can do in SAM. Your options are customized to your user account and roles. Select a section from the sub-navigation menu to begin. Here is an overview of the most popular sections.

My User Roles
Your SAM user account needs roles to do most things in SAM. Select My User Roles from the My SAM sub-navigation menu to view your current roles, request new roles, or manage role invitations.

Entity Registrations
Do you want to do business with the U.S. Federal Government? Select Entity Registrations from the My SAM sub-navigation menu to create, update, renew, or deactivate your entity registration.

My Data Access
Are you a Federal government user who needs sensitive registrant data, or access to a non-public SAM data extract or web service, to manage contract or grant awards? Select My Data Access from the My SAM sub-navigation menu to request or renew access to non-public data in SAM.

If you have any questions, select Help from the main navigation menu to access user guides, training materials, FAQs, or [contact our Service Desk](#).

Register Entity Overview

Registration Overview

Overview

→ **Registration Overview**

Purpose of Registration

Core Data

Assertions

Representations and Certifications

Points of Contact

Submit Certification

BACK TO USER DASHBOARD

Core Data
Mandatory for all registration types. Includes, but is not limited to, an entity's DUNS and/or DoDAAC CAGE or NCAGE, code, TIN or EIN number, general information, financial information, and details 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, response to the Small Business Set-Aside (SBSA) program, and other FAR and 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.

You are now going to tell the government about yourself.

In the next few pages, we will review a few of the areas that cause clients the most difficulties. If you run into trouble in a section we do not cover, save your registration and call your PTAC counselor. We will be able to go back and fix areas before you hit submit.

Purpose of Registration

The screenshot shows the 'Purpose of Registration' page in the SAM.gov system. On the left is a navigation menu with options: 'Determine Purpose' (selected), 'Confirm Purpose', 'Core Data', 'Representations and Certifications', 'Points of Contact', and 'Submit Certification'. Below the menu is a 'BACK TO USER DASHBOARD' button. The main content area has a 'Page Description' box explaining the registration process. Below this are two questions with radio button options. The first question asks for the entity type, with options: Business or Organization, U.S. State Government, U.S. Local Government, Tribal Government, and Foreign Government. The second question asks why the entity is registering, with options: 'I want to be able to bid on federal contracts or other procurement opportunities...' and 'I only want to be able to bid on federal contracts or other procurement opportunities...'. At the bottom right are 'PREVIOUS' and 'NEXT' buttons.

Purpose of Registration

- Determine Purpose
- Confirm Purpose

Core Data

Representations and Certifications

Points of Contact

Submit Certification

[BACK TO USER DASHBOARD](#)

Page Description

This page will help you determine your entity's purpose of registration. First, select what type of entity you are registering in SAM. Then state why you are registering. Based on your response, you will complete different registration sections.

If you want to obtain federal contract awards, you must complete all four sections of the registration: Core Data, Assertions, Representations & Certifications (Reps & Certs), and Points of Contact (POCs). This is required by the Federal Acquisition Regulation (FAR) in [FAR 52.204-7 System for Award Management](#).

If you are only interested in federal assistance opportunities, such as grants and loans, you must complete two sections of the registration: Core Data and POCs. If you decide later to pursue federal contract awards, you must update your SAM registration to change your purpose of registration and complete all four sections.

Mandatory fields are marked with an asterisk or star symbol. Complete all mandatory fields before continuing to the next page.

What type of entity are you registering?*

- Business or Organization
- U.S. State Government
- U.S. Local Government
- Tribal Government
- Foreign Government

Why are you registering this entity to do business with the U.S. government? *

- I want to be able to bid on federal contracts or other procurement opportunities. I also want to be able to apply for grants, loans, and other financial assistance programs.
- I only want to be able to bid on federal contracts or other procurement opportunities. I do not want to apply for grants, loans, and other financial assistance programs.

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

TIP: Selecting “yes” for “Do you want to bid on contracts?” triggers extra questions you will need to answer to ensure you are in compliance. If you are registering for grants and other assistance you can select “no” for a shorter registration. This can always be changed at a later date. (MUST be changed before you bid on a contract)

Core Data

Overview

Purpose of Registration

Core Data

DUNS Information

- Verify DUNS Information
- Business Information
- CAGE or NCAGE Code
- Ownership Details
- Predecessor Details
- General Information
- Financial Information
- Executive Compensation Questions
- Proceedings Questions
- SAM Search Authorization
- Review Core Data

Assertions

Representations and Certifications

Points of Contact

Submit Certification

[BACK TO USER DASHBOARD](#)

Page Description

Please enter the information associated with the unique identifier of the entity you want to register, i.e. the information for the DUNS Number you were assigned by Dun & Bradstreet (D&B).

Mandatory fields are marked with an asterisk or star symbol. Complete all mandatory fields before continuing to the next page.

Unique Identifier:

DUNS Number:*

If you don't already have one, you can [request a DUNS Number for FREE from Dun & Bradstreet](#) or [contact D&B at 1-866-705-5711 or govt@dnb.com](#). International entities can email [SAL](#)

Entity Name:

D&B Legal Business Name:*

DUNS Physical Address:

Please enter the physical address associated with this DUNS number. Your SAM registration address to get your DUNS Number.

Address Line 1:*

Address Line 2:

City:*

State/Province:*

Please select a value

ZIP/Postal Code:*

Country:*

UNITED STATES

Ensure that the "details entered by user" and "details returned from D&B" are an exact match. If not, contact D&B to make changes [HERE](#)

(TIP: If you've made changes with D&B and they do not appear updated in SAM within 24 hours, click "Refresh D&B Data.")

IRS Consent THURSTON COUNTY ECONOMIC...

DUNS: 171676299 CAGE Code: 4ASMo

CONSENT TO DISCLOSURE OF TAX INFORMATION

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.

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 THURSTON COUNTY ECONOMIC DEVELOPMENT COUNCIL 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.

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.

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.

TIN Consent:

Notes: 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.

Tax Payer Name*: THURSTON COUNTY ECC
Taxpayer Identification Number(TIN): 911183169

Address: COPY MAILING ADDRESS COPY PHYSICAL ADDRESS

Address Line 1*: 665 WOODLAND SQ LOO
Address Line 2:
City*: LACEY
State/Province*: WASHINGTON
ZIP/Postal Code*: 98503
Country*: UNITED STATES

TIP:

Incorrect data entry on the DUNS information and IRS consent pages are two of the most frequent mistakes that impact a business' ability to complete their registration in SAM.

Ensure that your Taxpayer Identification Number (TIN) and all information on the IRS Consent page is correct.

We will walk through a few sections of the Core Data Section that many people have questions about. If you have issues with other sections, contact your PTAC counselor.

TIP: After you have gone through each page of the "Core Data" section, you will be prompted "Continue to Next Section?" Select YES. You will receive this prompt at the end of each section of the registration.

Core Data

- DUNS Information
- Verify DUNS Information
- Business Information
- CAGE or NCAGE Code
- **Ownership Details**
- Predecessor Details
- General Information
- Financial Information
- Executive Compensation Questions
- Proceedings Questions
- SAM Search Authorization
- Review Core Data

Page Description

Federal Acquisition Regulation (FAR) Subpart 4.18 requires that you provide information about your entity's ownership and control as part of your SAM registration. We are gathering this information now to populate a provision you will certify to later in Reqs & Certs. If you don't know your owner's CAGE/NCAGE Code, you can [look it up](#). If your owner is located in the U.S. or its territories, not required to register in SAM, and doesn't have a CAGE Code, they need to [get a CAGE Code](#) before you can complete your registration. If your owner is located outside the U.S. or its territories, not required to register in SAM, and doesn't have an NCAGE Code, they need to [request an NCAGE Code](#) right away. You cannot complete your registration without it. Please note you cannot use your own entity's CAGE/NCAGE Code for either level of owner, nor can you use the same CAGE/NCAGE Code for both Immediate and Highest-Level Owner.

Mandatory fields are marked with an asterisk or star symbol. You must complete all mandatory fields before continuing to the next page.

Does another entity own or control the entity you are registering?* Yes No
 This is your [Immediate Owner](#).

Is your Immediate Owner located outside the U.S. and its territories?* Yes No

Enter your Immediate Owner's CAGE Code.*
 Select "Verify" to see the information for that CAGE Code. If this represents your Immediate Owner, answer the next question. If not, enter a different CAGE Code and select "Verify." [Look up](#) the CAGE Code if you don't know it.*

Enter Owner's (N)CAGE Code:

Immediate owner means an entity other than the business registering, that has direct control of the business registering. Indicators of control include, but are not limited to, one or more of the following: Ownership or interlocking management, identity of interests among family members, shared facilities and equipment, and the common use of employees.

Core Data

- DUNS Information
- Verify DUNS Information
- Business Information
- CAGE or NCAGE Code
- Ownership Details
- **Predecessor Details**
- General Information
- Financial Information
- Executive Compensation Questions
- Proceedings Questions
- SAM Search Authorization
- Review Core Data

Page Description

Federal Acquisition Regulation (FAR) Subpart 4.1804 (d) requires that you provide information about your entity's predecessors as part of your SAM registration. Predecessor refers to an entity that is replaced by a successor and includes any predecessors of the predecessor. We are gathering this information now to populate a provision you will certify to later in Reqs & Certs. If you don't know your predecessor's CAGE/NCAGE Code(s) use [CAGE Search](#) to look it up. Please note you cannot use your own entity's CAGE/NCAGE Code for any predecessor, nor can you use the same CAGE/NCAGE Code for multiple predecessors.

Mandatory fields are marked with an asterisk or star symbol. Complete all mandatory fields before continuing to the next page.

Are you a successor to a predecessor that held a Federal contract or grant within the last three years?* Yes No

Please provide the data for your three most recent predecessors in reverse chronological order (newest to oldest). You must enter at least your most recent predecessor. You can enter up to three predecessors.

"Predecessor" means an entity that is replaced by a successor and includes any predecessors of the predecessor.

"Successor" means an entity that has replaced a predecessor by acquiring the assets and carrying out the affairs of the predecessor under a new name (often through acquisition or merger). The term "successor" does not include new offices/divisions of the same company or a company that only changes its name.

- Core Data
- DUNS Information
- Verify DUNS Information
- Business Information
- CAGE or NCAE Code
- Ownership Details
- Predecessor Details
- General Information
- **Financial Information**
- Executive Compensation Questions
- Proceedings Questions
- SAM Search Authorization
- Review Core Data

Financial Information

Page Description
Please enter the requested information below about the en

Do you accept credit cards as a method of payment? *

FIRST CITIZENS BANK - Checking

Electronic Funds Transfer (EFT):

Account Type: *

Financial Institute: FIRST CITIZENS BANK

ABA Routing Number: *

Account Number: *

Lockbox Number:

Automated Clearing House (ACH):
Please enter at least one method of contact for your ACH below.

ACH U.S. Phone: *

ACH Non-U.S. Phone:

ACH Fax:

ACH Email:

Remittance Address:

Name: *

Address Line 1: *

Address Line 2:

City: *

State/ Province: *

Country: *

ZIP /Postal Code: *

ENTERING/UPDATING BANKING INFO

1. Indicate whether your business accepts credit cards.
2. Ensure that banking information is entered accurately and kept up-to-date. This is the banking account that all payments will be made to.
3. ACH Contact Information = Your bank
4. Remittance Address = Address you'd like a paper check sent in the event that it becomes necessary.
5. To change your banking information, simply change the routing number, click save at the bottom of the page, and then click "Financial Information" on the navigation bar to return to this page. Changing and saving your new routing number will allow you to enter your new banking information. **DO NOT** select "Add New Account Details." This option will not update your banking information.

Assertions

- Overview
- Purpose of Registration
- Core Data
- Assertions**
 - Goods and Services
 - Size Metrics
 - EDI Information
 - Disaster Response Information
 - Review Assertions
- Representations and Certifications
- Points of Contact
- Submit Certification

The Assertions section is where you enter information that determines if you are a small business, including:

- Your NAICS codes. Be sure to indicate your primary NAICS code.
- Average annual receipts
- Average number of employees

This is also the section where you have an opportunity to indicate that you are available to do business with FEMA in the event of a disaster.

Assertions

Requested information below for your entry.

- Goods and Services
- Size Metrics
- EDI Information**
- Disaster Response Information
- Review Assertions

EDI Information for your non-government entity? No

ISA Identifier:

Functional Group Identifier:

820s Request Flag: Please select a v

The EDI Information page is optional and only applies to those who do business with the government through Electronic Data Interchange (EDI), or computer-to-computer exchange of business data.

This will not apply to many businesses.

Representations and Certifications

Representations and Certifications

- FAR Response 1
- FAR Response 2
- FAR Response 3
- FAR Response 4
- Architect-Engineer Response
- Defense Response
- Review Representations and Certifications

The "Representations and Certifications" section of SAM will be automatically populated with FAR regulations and other contractual considerations. These are based on your answers to the previous sections.

TIP: It is important you read and understand all the noted regulations as you will be agreeing to these stipulations when you submit your application. See the following pages for notes on common FAR questions and refer to the [Federal Acquisition Regulations \(FAR\)](#).

If you do not understand a question or a clause of the FARs referenced in this section, contact your attorney or a PTAC representative.

Points of Contact

- Overview
- Purpose of Registration
- Core Data
- Assertions
- Representations and Certifications
- Points of Contact**
- POC Details
- Submit Certification

Page Description
Please enter the requested information below. Based on your answers provide registration process, the 'POC Type' list has been filtered to provide you only POC Types.

Mandatory Points of Contact

Electronic Business POC

Title:

First Name: *

Middle Name:

Last Name: *

Email: *

Phone: * US or Non US Phone is mandatory

US Phone:

Extension:

Non US Phone:

Fax: *

Notes:

Address Line 1: *

Address Line 2:

City: *

TIP: You do not have to use all the POC entries.

At a minimum be sure to add:

- Accts Receivable
- Government Business
- Electronic Business (the person who will be submitting invoices)

FAQs regarding FAR responses:

1. Who are the persons within your business responsible for determining prices offered in bids/proposals?

PTAC Says: Make sure all persons responsible for determining prices are listed, this can be updated at any time. If you are going after a certification such as CVE or WOSB make sure the Veteran or women owners are on this list.

5. Is your business a small business concern that wishes to be considered for status as a labor surplus area (LSA) concern? (FAR 52.219-2)

PTAC Says: Labor Surplus area 52.219-2 (b) "...The bidder's status as a labor surplus area (LSA) concern may affect entitlement to award in case of tie bids. If the bidder wishes to be considered for this priority, the bidder must identify, in the following space, the LSA in which the costs to be incurred on account of manufacturing or production (by the bidder or the first-tier subcontractors) amount to more than 50 percent of the contract price.

17. Are you a Small Disadvantaged Business?

PTAC Says: (13 CFR 124.103-104) What is a small disadvantaged business? One that meets the small business size standard and is at least 51% owned and controlled by one or more individuals who are both socially & economically disadvantaged.

Socially disadvantaged means subjected to racial or ethnic prejudice or cultural bias within American society because of their identities as members of a group.

Economically disadvantaged means net worth less than \$750,000

22 & 23. Has your business filed all required Equal Employment Opportunity compliance reports?

PTAC Says: It's ok to say 'No' if you have not had a contract required to written affirmative action plans by the Secretary of State. You will get to justify your 'No' in question 23.

25. Does your business provide services as described in FAR 22.103-4(d)(1)?

PTAC Says: FAR 22.1003-4(d)(1)

(d) Contracts for certain services.-

- (i) Automobile or other vehicle (e.g., aircraft) maintenance services (other than contracts or subcontracts to operate a Government motor pool or similar facility).
- (ii) Financial services involving the issuance and servicing of cards (including credit cards, debit cards, purchase cards, smart cards, and similar card services).
- (iii) Hotel/motel services for conferences, including lodging and/or meals, that are part of the contract or subcontract for the conference (which must not include ongoing contracts for lodging on an as needed or continuing basis).
- (iv) Maintenance, calibration, repair, and/or installation (where the installation is not subject to the Construction Wage Rate Requirements statute, as provided in 29 CFR 4.116(c)(2)) services for all types of equipment where the services are obtained from the manufacturer or supplier of the equipment under a contract awarded on a sole source basis.

27. Is your business an inverted domestic corporation?

PTAC Says: 52.212-3:“Inverted domestic corporation”, means a foreign incorporated entity that meets the definition of an inverted domestic corporation under 6 U.S.C. 395(b).

6 U.S.C. 395(b):

(b) Inverted domestic corporation. For purposes of this section, a foreign incorporated entity shall be treated as an inverted domestic corporation if, pursuant to a plan (or a series of related transactions)-

- (1) the entity completes before, on, or after November 25, 2002, the direct or indirect acquisition of substantially all of the properties held directly or indirectly by a domestic corporation or substantially all of the properties constituting a trade or business of a domestic partnership;
- (2) after the acquisition at least 80 percent of the stock (by vote or value) of the entity is held-
 - (A) in the case of an acquisition with respect to a domestic corporation, by former shareholders of the domestic corporation by reason of holding stock in the domestic corporation; or
 - (B) in the case of an acquisition with respect to a domestic partnership, by former partners of the domestic partnership by reason of holding a capital or profits interest in the domestic partnership; and
- (3) the expanded affiliated group which after the acquisition includes the entity does not have substantial business activities in the foreign country in which or under the law of which the entity is created or organized when compared to the total business activities of such expanded affiliated group.

28. Is your business a subsidiary of an inverted domestic corporation?

PTAC Says: 52.219-10(a):“Subsidiary” means an entity in which more than 50 percent of the entity is owned—

- (1) Directly by a parent corporation; or
- (2) Through another subsidiary of a parent corporation

**Didn't get your question answered? If you see this anywhere in SAM:
that means that you can click the link to see the full FAR which sometimes helps you give the
correct answer, if that still doesn't help—contact your PTAC and we're happy to provide
additional clarification!**

Small Business Concern—Updating the SBA Database

The screenshot displays the SAM (System for Award Management) interface. On the left, a navigation menu under 'Register Entity' includes 'Registration Overview', 'Purpose of Registration', 'Core Data', 'Assertions', 'Representations and Certifications', 'Points of Contact', 'Small Business Certification' (highlighted with a red box and arrow), and 'Submit Certification'. The main content area is titled 'SBA Supplemental' and contains the following text: 'You have successfully completed the Assertions portion of your entity's registration. Please review the information below if you would like to apply for a Small Business Administration (SBA) certification program. If you are applying for certification as a HUBZone, 8(a) Business Development, or 8(a) Joint Venture Program, you must complete the SBA Supplemental page. Click the Register or Update your SBA Profile button located at the bottom of the page to go directly to the supplemental page specific to your entity. Note: When you click the button, you will be logged out of SAM and must log back in when you are ready to proceed with the registration process. The SBA will notify SAM if and when your entity is added to a certification program. SAM will send an e-mail to your entity's administrator when the SBA sends the confirmation. If your entity is added to the 8(A) or 8(a) Joint Venture program, the Business Type information will be updated. You will be instructed to review the changes found on the General Information page and to re-certify to your entity's small business status. If you are added to the HUBZone program, the Representations and Certifications portion of your entity's registration must be updated. You will be instructed to review the changes and re-certify.' At the bottom of the page, there is a 'Register or Update SBA Profile' button circled in red, and a 'SAVE AND CONTINUE' button. A red arrow points to the 'Small Business Certification' menu item, another red arrow points to the 'Register or Update SBA Profile' button, and a third red arrow points to the 'SAVE AND CONTINUE' button.

If you are a **small for profit business** you will have the option of updating the SBA database. ALL small businesses should register/update their SBA profile. This database is used by contracting officers and prime contractors to find vendors.

Clicking the gray button will put you into the SBA DSBS database. Most of your information from SAM will be automatically populated in the database.

You can add additional information at this time or return later to update the SBA profile. You will be able to access this profile through SAM and/or through the SBA's [General Login System](#).

See Washington PTAC for a *How To Update Your SBA Profile* for further instructions.

Submitting Your Registration

Entity Review

You have completed all sections of your entity's registration in SAM. Please validate that the information below is correct before continuing. Use the EDIT button to make changes to the appropriate sections. If you are satisfied with the information entered previously, please click SUBMIT.

DUNS Number:
D&B Legal Business Name:
Doing Business As: (none)

Core Data [Expand All] | [Collapse All]

Business & TIN Information: EDIT

Business Information:
Business Start Date:
Fiscal Year End Close Date:
Company Division Name:
Company Division Number:
Corporate URL:
Congressional District:
MPIN:
Physical Address:
Address Line:

CANCEL SUBMIT

1. Review all info

2. Scroll to bottom of screen and click

Confirmation Page NW HEATING AND COOLING INC.
DUNS: 040671214 CAGE Code: 6QC95

Congratulations!
You have completed the registration of your entity. Please click the View Summary button below to be redirected to the Entity Overview Page of the Entity Dashboard.

VIEW SUMMARY

Make sure the confirmation page pops up. You are done!

Submitting Your Notary Letter

As of **March 2018** all new SAM registrants must mail a notarized letter to the Federal Service Desk declaring their entity administrator. Below is an example of the required letter. Ask your PTAC counselor for an editable template

For further information go here:

https://www.fsd.gov/fsd-gov/answer.do?sysparm_kbid=d2e67885db0d5f00b3257d321f96194b&sysparm_search=kb0013183

Copy and Paste onto company letterhead

Attention: Federal Service Desk

Regarding Duns # _____

Date of Letter here

Purpose of Letter: To Declare an Entity Administrator for New SAM Account

The purpose of this notarized letter is to designate [insert name of Entity Administrator] as Entity Administrator for [company]. I, [name and title of signatory], hereby confirm that [Insert name of Entity Administrator] is an authorized officer, agent, or representative of [insert entity name, or, for individuals representing themselves, say him/herself]. This letter will authorize [Insert name of Entity Administrator] to have access to the System for Award Management (SAM).

SAM is a computer system managed by the Federal Government, and it is only accessible by individuals who are either authorized to represent a particular entity, or by individuals representing themselves. Accessing or using SAM, or information contained therein, for any unauthorized or illegal purposes, may have civil and criminal penalties, and may negatively impact the status of the SAM registration maintained on this entity.

I, the below-signed, attest to the accuracy of all information contained in this letter. For the purpose of registering with the United States Government through the online System for Award Management (SAM), I do not authorize any third party to act on behalf of [insert entity Legal Business Name].

Sincerely,

Name _____ Phone _____
Title _____ Email _____
Company Name _____ Website _____

State of Washington
County of _____

On this day _____ appeared before me, signed this Declaration of

Application, and swore (or affirmed) that (he/she) understood its contents and that its contents are truthful.

Dated _____:

(Seal or stamp)

Signature of notary public

Residing at _____

SECTION TWO: UPDATING YOUR ENTITY

A

SELECT →

Page Description

This page allows you to manage your existing entity registrations regardless of the record status. The Entity List contains all entities with which you have user roles. You can search for entities within this list or simply select the entity for which you want to view, update, delete, or deactivate a registration record.

Once you select an entity, your registration details will display in either the Registration Details for Complete Record section or the Registration Details for Incomplete Record section. If you started an update to either an active or inactive registration record, you will find registration details in both sections. Check the Registration Status, then select the action you wish to take.

For keyboard only users, please tab to the desired entity and then press the Enter key to expand the child entities. Press the space bar to select an entity from the Entity List and the details will display in the appropriate Registration Details table.

To register a new entity in SAM, select the Register New Entity link from the sub-navigation menu.

IMPORTANT: If you navigate away from a page during the registration process without selecting Save and Continue, the information entered on the page will NOT be saved, you must select Save and Continue on every page.

Search for an Entity :

Legal Business Name:

DUNS Number:

CAGE/NCAGE Code:

[Download Your Active SAM Registrations \(XML\)](#)

Entity List

<input type="checkbox"/>	<input type="checkbox"/>	THURSTON COUNTY ECONOMIC DEVELOPMENT COUNCIL (171676299)
<input type="checkbox"/>	<input type="checkbox"/>	THURSTON COUNTY ECONOMIC DEVELOPMENT COUNCIL BUSINESSRESOURCE CENTER (831932889)

Purpose of Entity Update

DUNS: CAGE Code:

Page Description

The system will guide you through the entity update process based on the answer you provide below. If you choose to only update the Points of Contact (POCs), the entity status will remain unchanged and you will still be required to update the registration prior to its set expiration date.

What would you like to update?

Please select a value

Purpose of Registration and remaining entity registration

TIP: We suggest selecting “Purpose of Registration and remaining entity registration” - this way you can make sure your entire SAM registration is as up to date as possible.

You will now go through each section one by one and save and continue. If you need a review on the sections, refer to Section One for guidance.

SECTION THREE: MIGRATING AN OLD ACCOUNT

The screenshot shows the 'MY SAM' user interface. On the left is a navigation menu with the following items: My User Roles, My Roles, Invitations, Migrate Legacy System Account (highlighted with a red arrow and the letter 'A'), Migrated Accounts, Request Role with New Entity, Entity Users, Entity Registrations, My Account Settings, My Data Access, and General. The main content area is titled 'Migrate Legacy System Account' and contains a text box explaining the migration process, a list of legacy systems with radio buttons (Central Contractor Registration (CCR) / CCR Tools, Federal Agency Registration (FedReg), and Excluded Parties List System (EPLS)), and a 'NEXT' button.

You will need the original email address your old account was registered under.

If you do not have the email account, you will be asked for additional information.

Contact your PTAC or SAM Help Desk if you have issues migrating an account.

The screenshot shows the 'Provide Legacy Account Information' form. It includes a text box with instructions: 'Please provide the following data for the entity registration record you want to manage. All fields are mandatory. The information you enter must match exactly what was in the CCR registration record for the DUNS number you provide. This is to validate your knowledge of the prior record and confirm your right to manage the registration in SAM. Note, the Taxpayer Identification Number (TIN) and the bank Account Number will be masked both when you enter and confirm what you entered.' Below the text are input fields for: DUNS *, Taxpayer Identification Number *, Confirm Taxpayer Identification Number *, Bank Routing Number *, Bank Account Number *, and Confirm Bank Account Number *.

Now what?

- You will receive two separate emails from samadmin@sam.gov within three to five business days notifying you that your TIN and your CAGE Code have been validated and that your SAM registration is active.
- If you receive emails notifying you that there was an issue validating your TIN number or CAGE code, please follow the instructions on the email and **contact your PTAC counselor if you need assistance**.
- If you do not receive the emails and want to check the status of your registration, log on to your SAM account and review your **complete registrations** to check the status of your application. If you do not see a complete registration listed, check under **incomplete registrations**.
- **Work in progress** means that your registration has been saved but needs to be submitted, or in some cases, resubmitted. **Submitted** means that you are waiting on TIN and/or CAGE validation. Active means that your SAM registration is active for a period of one year, at which time you will need to update your information and resubmit.

Checking the Status of Your SAM Registration

My User Roles

- Entity Users
- Entity Registrations**
 - Existing Entity Registrations
 - Register New Entity
 - BioPreferred Reporting
- My Account Settings
- My Data Access
- General

Page Description

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Search for an Entity

Legal Business Name:

DUNS Number:

CAGE/NCAGE Code:

[Download Your Active SAM Registrations](#)

Entity List

<input type="checkbox"/>	THURSTON COUNTY ECONOMIC DEVELOPMENT COUNCIL (171676299)
<input type="checkbox"/>	THURSTON COUNTY ECONOMIC DEVELOPMENT COUNCIL BUSINESSRESO

Registration Details

Entity Name: THURSTON COUNTY ECONOMIC DEVELOPMENT COUNCIL

Entity Details

DUNS Number: 171676299

Address Line 1: 665 WOODLAND SQ
LOOP SE ST STE 201

Address Line 2:

City: LACEY

State: WA

ZIP/Postal Code: 985031009

Registration Status: **Work In Progress**

Need more help?

We are only one click away.

