



Government Contracting Basics: System for Award Management SAM.GOV

James R. (Jim Bob) Rollins
Procurement Counselor
UTA Cross Timbers APEX Accelerator

2023

“This APEX Accelerator is funded in part through a cooperative agreement with the Department of Defense.”



CROSS TIMBERS
Procurement Technical Assistance Center

University of Texas at Arlington



Cross Timbers

APEX Accelerator



CROSS TIMBERS

The UTA Cross Timbers Procurement APEX Accelerator is funded through a cooperative agreement with the Department of Defense, the University of Texas at Arlington (UTA), and Third Party Contributors.

www.uta.edu/crosstimbers



CTAA Services are FREE!!!

- **Purpose:** CTAA is a non-profit organization that assists small businesses compete and win government contracts from federal, state, and local government agencies.
- **Services Offered:**
 - Federal, State and local government contracting laws, policies and procedures. Emphasis must be placed on requirements and procedures used by DoD and other Federal agencies, including registration in systems such as the System for Award Management (SAM)
 - The DoD Mentor-Protégé Program (MPP) and similar Government programs
 - Accounting system requirements and contract payments
 - The Procurement Integrated Enterprise Environment (PIEE) and Wide Area Work Flow (WAWF)
 - Subcontracting
 - DLA Internet Bid Board System (DIBBS)
 - Small Business (SB) Innovative Research (SBIR) / SB Technology Transfer (STTR) Existing federal government and DoD cybersecurity regulation compliance. PTACs are also encouraged to refer businesses to Project Spectrum for additional assistance with cybersecurity preparedness. (projectspectrum.io)
 - Obtaining federal contract data from data repositories (e.g. SAM.gov)
 - Finding federal procurement opportunities
 - Business size and type (socioeconomic) certifications
 - Information about contract-related risks related to Foreign Ownership, Control, and Influence (FOCI)



Webinar

- A copy of the presentation is located at -
<http://www.uta.edu/crosstimbers/pages/Webinars/index.php>
- Future classes can be found at -
<http://www.uta.edu/crosstimbers/pages/events-workshops/upcoming-events.php>



Outcome of Webinar

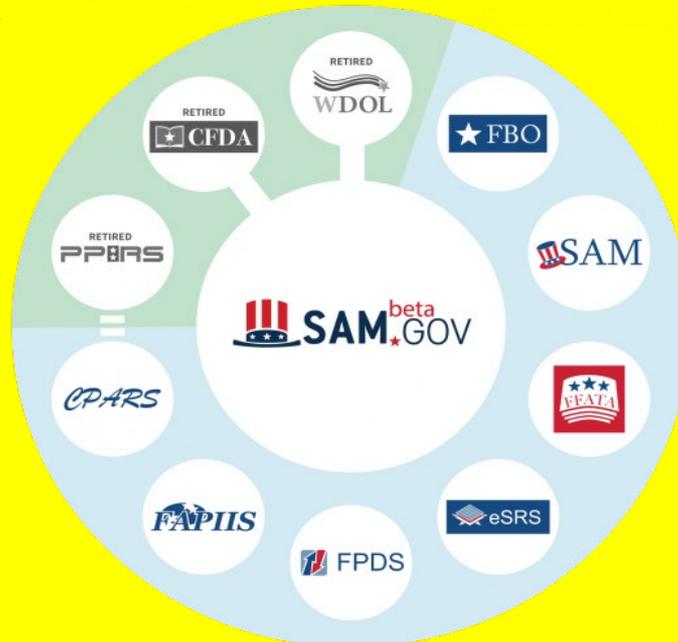
- Provide a history of the System Award Management (SAM)
- Explain the basics you need to register in SAM
- How to register in SAM



History

The Integrated Award Environment (IAE) Systems

- IAE manages the federal information technology systems
- IAE manages the Federal Service Desk that assists users with these systems - <https://fsd.gov/fsd-gov/home.do>
- SAM.gov - will eventually become the centralized, authoritative source of the federal systems
- Legacy systems EPLS, CCR, ProNet, ORCA, WDOL, CFDA, PPIRS, FedBizOpps.gov





Required Information

- **Legal Business Name** – as used to establish your business – State of Texas, must match across all systems – DUNS, IRS, SAM, etc.
- **Physical Address** – no PO Boxes – used to verify location of business
- **Data Universal Numbering System (DUNS) Number provided by Dun and Bradstreet (D&B)** - <https://fedgov.dnb.com/webform/>
 - Has been phased out, but still good to do this, since it is free
 - Replaced with Unique Entity Identifier (UEI) SAMMI (SAM Managed Identifier) – this is populated when you do your SAM registration
 - DUNS information must match with legal business name and physical location, since this is used by SAM for verification and other Federal Websites.
- **Tax Identification Number (TIN)** – www.irs.gov
 - Name and address must match between D&B – IRS – SAM – State of Texas
- **Type of Ownership** – Sole Proprietorship, Partnership, LLC, etc.



Required Information (CONT)

- **Business Type** – Minority, Woman, Service Disabled Veteran
 - 51% or more owner
 - Highest office in the company (entity)
 - Involved in day to day operations
- **North American Industry Classification System (NAICS) Codes** -
<http://www.census.gov/eos/www/naics/>
- **Number of Employees** – average on past 12 months
- **Gross Income** – Averaged over the last three completed fiscal years
- **FYI** - Size Standard to determine Small or Large Business is based on the Small Business Administration, Table of Small Business Size Standards, Matched to North American Industry Classification System Codes
 - <https://www.sba.gov/document/support--table-size-standards>



Required Information (CONT)

- **Electronic Fund Transfer (EFT):**
 - ABA Routing Number
 - Account Number (checking or savings)
 - Telephone number for banking institution (Automated Clearing House - ACH)
- **Commercial and Government Entity (CAGE)** – If you have one, otherwise will be provided with a completed SAM Registration



SAM Registration

- System for Award Management (SAM) is mandatory if you want to receive federal funds – contracts or grants.
- SAM is required if applying for grants, cooperative agreements, business opportunities, and SBA certifications.
- Beware of SCAMS and Programs that are not free. **Average Cost is \$599, but seen \$1,500.**
- Registration is **FREE** and domain name ends in “.gov” NOT “.com”, “.net”, etc. Don’t be confused by look-alike web sites!!
- Validates the vendor's information and electronically shares the secure and encrypted data with the federal agencies' finance offices to facilitate payments through Electronic Fund Transfer (EFT).
- SAM shares the data with government procurement and electronic business systems.
- Must renew annually to maintain “Active” status! Recommend ever six months.
- **NOTE: There are 991,907 Active Registrations in SAM as of 6 Feb 2023.**



SAM is a Two-Part Registration

- SAM registration involves Users and Entities
 - Individual human beings are Users
 - Companies (including Sole Proprietors) are Entities
- Users register in LOGIN.GOV
- Entities register in SAM.GOV
- In order to register your entity in SAM, you must first register as a User at LOGIN.GOV



SAM Registration

https://www.sam.gov/

An official website of the United States government [Here's how you know](#) Sign In

Home Search Data Bank Data Services Help



 **Official U.S. Government Website**
100% Free

The Official U.S. Government System for:

<p>Contract Opportunities (was fbo.gov)</p> <p>Contract Data (Reports ONLY from fpds.gov)</p> <p>Wage Determinations (was wdol.gov)</p> <p>Federal Hierarchy Departments and Subtiers</p>	<p>Assistance Listings (was cfda.gov)</p> <p>Entity Information Entities, Disaster Response Registry, and Exclusions</p> <p>Entity Reporting SCR and Bio-Preferred Reporting</p>
---	---

NEW [Learn More](#)

Register Your Entity or Get a Unique Entity ID

Register your entity or get a Unique Entity ID to get started doing business with the federal government.

Get Started

Renew Entity

 **Check Registration Status**

Already know what you want to find?

Select Domain... ▼ e.g. I606N020Q02

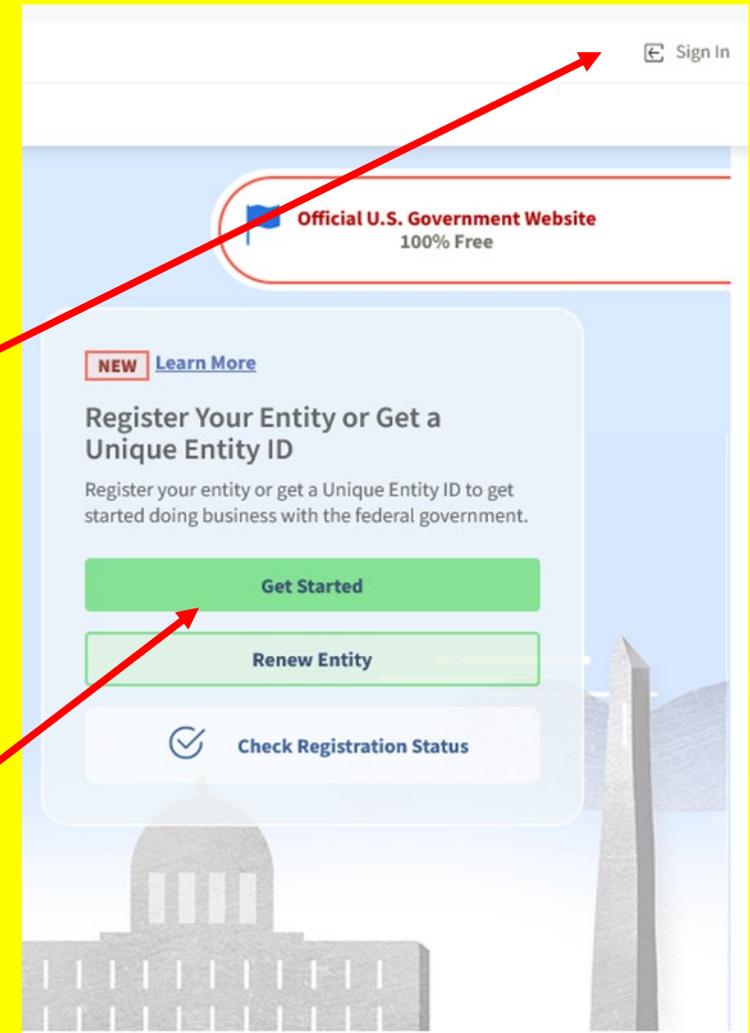




SAM Registration

<https://www.sam.gov/>

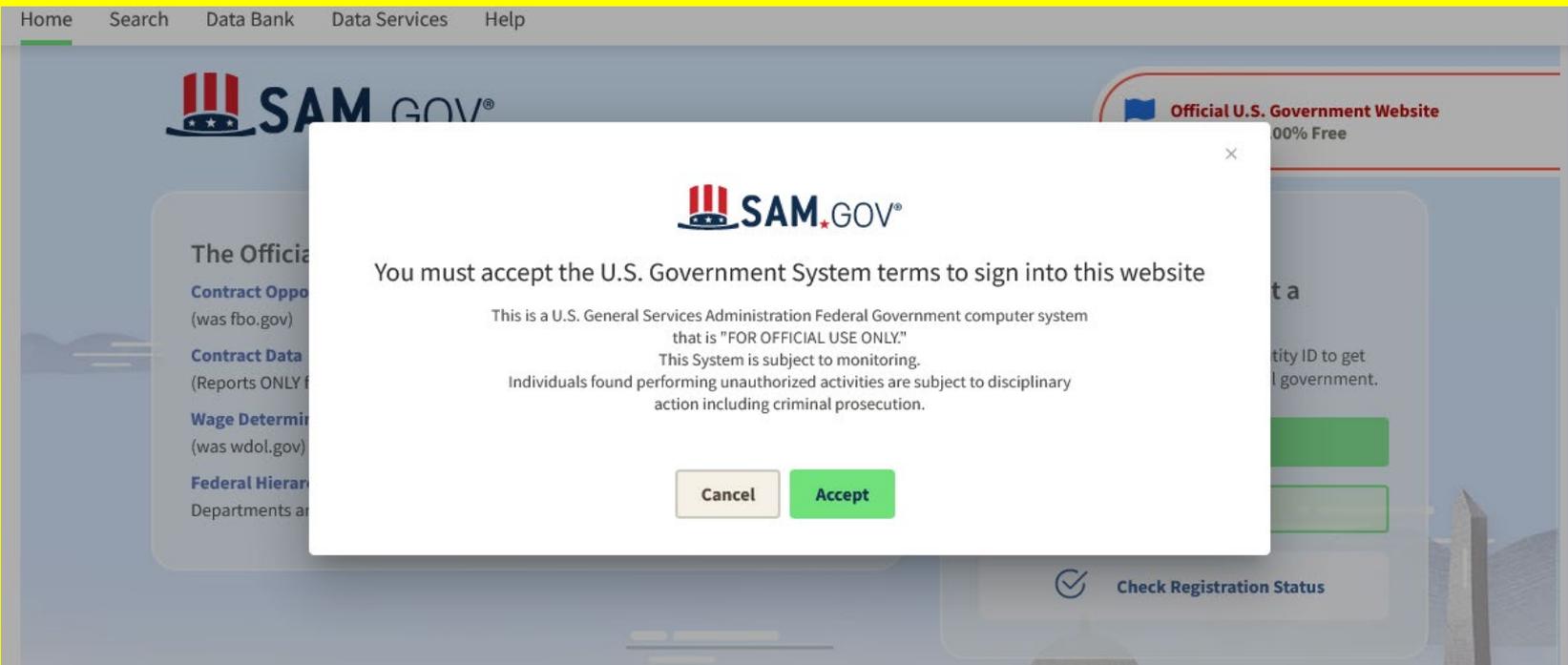
- This is where you start getting into the SAM Registration
- If you already have a SAM Registration and a LOGIN.GOV login you will be able to search for other SAM registrations and have greater search capabilities for:
 - Contract Opportunities
 - Assistance Listings
 - Entity Information
 - Federal Hierarchy
 - Wage Determinations
- If you are starting a new Registration or Renewing your Entity
- **REMEMBER – YOU WILL HAVE TO DO LOGIN.GOV**





SAM Registration

<https://www.sam.gov/>



- This will then take you to LOGIN.GOV
- Have to click ACCEPT



SAM Registration

<https://www.login.gov/>

An official website of the United States government. [Here's how you know](#)

LOGIN.GOV **SAM**
SYSTEM FOR ACQUISITION MANAGEMENT

SAM is using login.gov to allow you to sign in to your account safely and securely.

Email address

Password Show password

Sign in

Create an account

[Sign in with your government employee ID](#)

[Back to SAM](#)

[Forgot your password?](#)

[Security Practices and Privacy Act Statement](#)

Enter your security code

We sent a security code to (***) ***-1700. This code will expire in 10 minutes.

One-time code

Remember this browser

Submit

[Get another code](#)

Can't use your phone?
[Choose another authentication method](#)

[Cancel](#)



Login.gov

<https://www.login.gov/>

- **Login.gov: Not only for SAM!**
 - **Creating account:** email address, create strong password, authentication applications, and security code
 - **Authentication methods:** two-factor authentication (TFA) or multi-factor authentication (MFA), as an added layer of protection to secure your most sensitive information
 - **Verifying your identity:** Some government applications that use login.gov require users to verify their identities. This means that you must prove that you are who you say you are with additional information
 - **Signing in:** Every time you sign in to your account, you will need your email address, your password, and access to one of the two-factor authentication methods you set up; until you authenticate the website
 - **NOTE:** best to use your cell phone for two-factor authentication, since you can verify from anyplace and this is your personal login, not the company's login.



Login.gov

<https://www.login.gov/>

- **Changing settings:** Email address (add/remove), phone number, delete account, etc.
- **Privacy & security:** Protecting your information and respecting your privacy
- **Programs that use LOGIN.GOV:**
 - 60 Applications at 17 Agencies, with over 17 millions profiles.
 - Trusted Traveler Programs: administered by Department of Homeland Security; includes but not limited to Global Entry (entry into the U.S. from International Destinations) and TSA Pre✓
 - USAJOBS.GOV
 - SAM.GOV



SAM Registration

<https://www.login.gov/>

An official website of the United States government [Here's how you know](#) ▾

LOGIN.GOV | SAM.GOV®

SAM is using login.gov to allow you to sign in to your account safely and securely.

Email address

Password Show password

Sign in

Create an account

An official website of the United States government [Here's how you know](#) ▾

LOGIN.GOV | SAM.GOV®

Enter your email address

Email address

Select email language preference

login.gov allows you to receive your email communication in English, Spanish or French.

English (default)

Español

Français

Submit

[Cancel](#)

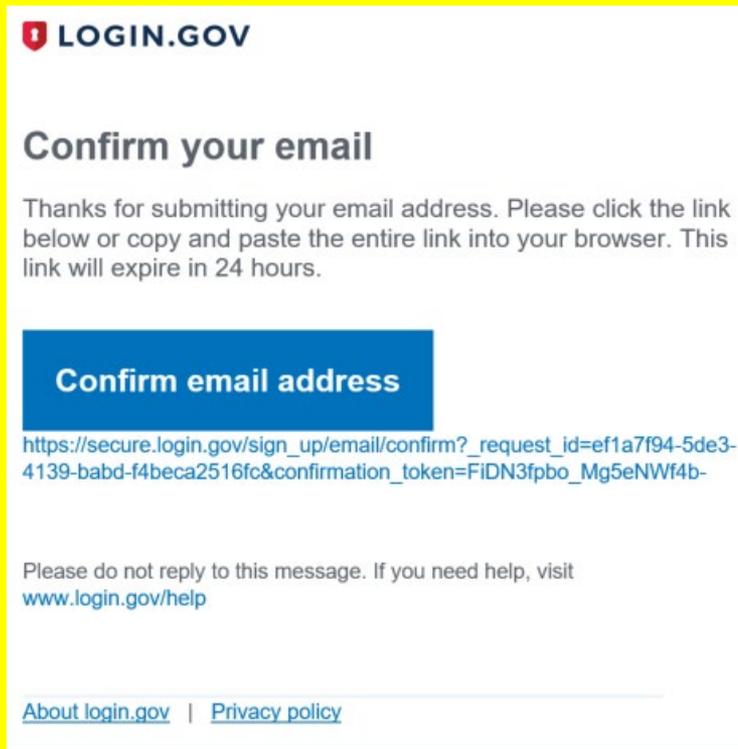
[Security and Privacy Practices](#) ↗

- Click “Create an Account”
- Enter email address



Confirming Email

- After you enter your email address in the provided box and select your language preference, click on the “Submit” button.
- You will receive an email at that address. You must confirm your ability to receive email at this address by clicking the button in the email.





Set a Password - (12 characters)

An official website of the United States government [Here's how you know](#) ▾

LOGIN.GOV | SAM.GOV®

✔ You have confirmed your email address

Create a strong password

It must be at least 12 characters long and not be a commonly used password. That's it!

Password Show password

Password strength: ...

[Continue](#)

[Password safety tips](#) +

[Cancel account creation](#)

- **Email addresses are critical.** If you change your email address without notifying login.gov or SAM, you will be locked out of the system. While this can be fixed, it's not fun, and it takes time, including a mandatory 24-hour delay.
- **Passwords:**
 - Make it memorable
 - Keep it secure
 - Put it somewhere that you can find it. You may not need it again for almost a year, but you'll really need it then, so keep this in mind.



Five (5) Main Registration Categories + SBA

Core Data: General Information, Corporation Information, D&B Monitoring (DUNS), IRS EIN, IRS Consent (Taxpayer Name), MPIN (Marketing Partner ID Number), Financial Information, Purchase Card, and SAM Search Authorization.

Assertions: Goods/ Services, North American Industry Classification System (NAICS) Codes, Product Service Codes (PSC), and Federal Supply Codes (FSC).

Representations & Certifications: Related to small business status responses to Federal Acquisition Regulation (FAR) and Defense Federal Acquisition Regulation Supplement (DFARS) provisions/clauses, and Architecture-Engineer Responses are entered in SAM once for use on all federal contracts.

Points of Contact:

- **Mandatory:** Accounts Receivable, Electronic Business, Government Business, Party Performing Certification (if used 3rd Party), Proceedings (if you entered details), Sole Proprietorship (if selected business type).
- **Optional:** Past Performance and Alternate POCs.

Optional - SBA Profile: SBA Supplemental Page – SBA Profile - Dynamic Small Business Search (DSBS); Company profile information from SAM will automatically populate SBA Profile. This is done through SBA General Login System to access it.

Submit Certification: Must do or registration just sits there and does not get processed.



SAM Steps

- Once you login to SAM you will see:

Get Started

Register Entity

An entity registration allows you to bid on government contracts and apply for federal assistance. As part of entity registration, we will assign you a Unique Entity ID (SAM).

Comprehensive and current entity information is an essential part of the federal award process. It is important to prepare your information and allow sufficient time to understand and accurately complete your registration. You only need to complete and manage it here to remain eligible for federal awards.

You must renew your registration every 365 days for it to remain active.

[Register Entity](#)

Get Unique Entity ID (SAM)

If you only conduct certain types of transactions, such as reporting as a sub-awardee, you may not need to complete an entity registration. Your entity may only need a Unique Entity Identifier.

You can get a Unique Entity ID (SAM) for your organization without having to complete a full entity registration.

[Get Unique Entity ID](#)

- After Accept – Choose what you want to do.
- Most Cases – Entity Registration – New or Existing



SAM Steps

Purpose of Registration

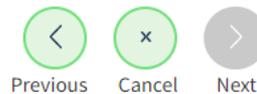
An entity within the SAM system includes prime contractors, organizations or individuals applying for assistance awards, those receiving loans, sole proprietors, corporations, partnerships, and any federal government agencies desiring to do business with the government.

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 apply for federal assistance opportunities like grants, loans, and other financial assistance programs.



- Entity Registering - Business or Organization
- Why – Bid on Federal Contracts



SAM Steps

- These are the steps you will take during the registration
- You will always scroll do the bottom of the page and click on either the next arrow or CONTINUE

The screenshot shows the SAM.GOV website interface. At the top, there is a navigation bar with the SAM.GOV logo and links for Home, Search, Data Bank, Data Services, Help, Requests, Notifications, Workspace, and Sign Out. Below this is a breadcrumb trail for 'Entity Registration'. The main content area is titled 'Confirm Purpose of Registration'. It features a 'Purpose of Registration' section with 'ALL AWARDS' selected and a 'Change Purpose of Registration' button. Below this, a note states: 'Based on the answers you provided on the previous page, you must complete the following entity registration sections.' There are five sections listed: 1. 'Unique Entity ID' (All registration types) with a description of validation. 2. 'Core Data' (All registration types) with a description of included information. 3. 'Assertions' ('All Awards' only) with a description of self-assertions. 4. 'FAR and DFARS Representations & Certifications' ('All Awards' only) with a description of representations. 5. 'Points of Contact' (All registration types) with a description of contact information. At the bottom, there are instructions for federal contract awards and federal assistance opportunities, and a note about the February 2, 2019 update. At the very bottom of the form, there are three buttons: 'Previous', 'Cancel', and 'Next'.



SAM Steps

- This is the information that is required to complete your registration.
- Make sure you have this before you continue.
- Once you come back to your registration, all these steps will be skipped.
- **NOTE: SOME OF THE SLIDES MIGHT LOOK DIFFERENT AS THE GSA UPDATES THINGS; BUT, THE INFORMATION IS STILL THE SAME.**

Gather Your Information

Purpose of Registration
ALL AWARDS [Change Purpose of Registration](#)

U.S. REGISTRANTS:

- ☑ **Entity Details:**
Legal Business Name
Physical Address
Date of Incorporation (if applicable)
State of Incorporation (if applicable)
- ☑ **Taxpayer Information:**
Taxpayer Identification Number (TIN)
Taxpayer Name
Review your tax documents from the IRS (such as a 1099 or W-2 form) to find your Taxpayer information.
- ☑ **Banking Information:**
Routing Number
Account Number
Account Type - checking or savings, to set up Electronic Funds Transfer (EFT).

INTERNATIONAL REGISTRANTS:

- ☑ **Entity Details:**
Legal Business Name
Physical Address
- ☑ **Taxpayer Information:**
Taxpayer Identification Number (TIN)
Taxpayer Name
Review your tax documents from the IRS (such as a 1099 or W-2 form) to find your Taxpayer information.
- ☑ **Banking Information:**
Routing Number
Account Number
Account Type - checking or savings, to set up Electronic Funds Transfer (EFT).
- ☑ **NCAGE Code:**
NATO Commercial And Government Entity (NCAGE) Code from the NATO Support and Procurement Agency (NSPA). If you don't already have one, you may request an NCAGE Code online for FREE from NSPA.
[Go to NCAGE Request](#)

Notes:
Entity Administrators and/or Entity Registration Representatives are responsible for ensuring the accuracy of an entity registration in SAM. An entity registration must be renewed every 365 days in order to remain active and will expire if it is not updated in a timely manner. An expired registration may affect the ability to do business with the Federal government.

[Previous](#) [Cancel](#) [Next](#)



SAM Steps

- Again, note the Green Check Marks and Arrows on the left side of the page.
- Remember all of this is common sense and not rocket science.

The screenshot displays the 'Register Entity' interface. On the left, a vertical menu lists various steps: 'Continue Registration' (highlighted with a blue arrow and a green checkmark), 'Business Information', 'CAGE or NCAGE Code', 'Ownership Details', 'Predecessor Details', 'General Information', 'Financial Information', 'Executive Compensation Questions', 'Proceedings Questions', and 'Review Core Data'. Below this menu are sections for 'Assertions', 'Representations and Certifications', 'Points of Contact', and 'Submit Registration'. A 'Back to Workspace' button is located at the bottom left. The main content area is titled 'Core Data' and 'Continue Registration', showing a 'Unique Entity ID (DUNS): 118559438'. A message states 'You have the following steps left to complete:' followed by a list of four items: 'Core Data' (with a server icon), 'Assertions' (with a document icon), 'Representations and Certifications' (with a seal icon), and 'Points of Contact' (with a person icon). A 'Cancel' button is at the bottom center. At the bottom right, there is a 'Feedback' button with a green downward arrow icon.



SAM Steps

Core Data

- Everything with an * is mandatory and shows required format, in red.

View assistance for Core Data - Business Information

Services Help

Register Entity Melissa Austin

Business Information Unique Entity ID (DUNS): 118431864

Core Data

- Entity Information
- Verify Entity Information
- Business Information**
- IRS Consent
- CAGE or NACE 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 Registration

[Back to Workspace](#)

Page Description

Please respond to questions on this page to better describe your entity. If you are required to provide a Taxpayer Identification Number (TIN), you may provide either an Employer Identification Number (EIN) or Social Security Number (SSN). Do not enter your SSN as your TIN unless you are a Sole Proprietor or a single-member Limited Liability Company (LLC) without an EIN. The TIN entered on this page will be sent to the IRS for validation after you complete the consent information on the next page.

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

Your Entity's Business Information:

Entity Start Date (M/M/D/D/YYYY): *

Fiscal Year End Close Date (MM/DD): *

Entity Division Name:

Entity Division Number:

Entity URL:

Congressional District: AR 03

Create MPIN: *

The MPIN will be shared with authorized partner applications (e.g. Grants.gov, Past Performance Information Retrieval System (PPIRS) etc.). The MPIN acts as your password in these systems and you should guard it as such. The MPIN must be nine characters long and contain at least one letter, one number, and no spaces or special characters.

Physical Address - ATKINS

Address Type:

Address Line 1:

Address Line 2:

City:

State/Province:

ZIP/Postal Code: 72823 4237

Country:

Mailing Address

Address Type:

[COPY PHYSICAL ADDRESS](#)



SAM Steps

Core Data

- Validates against data entered in Dun & Bradstreet for DUNS Number

- Overview
- Purpose of Registration
- Core Data
- ✔ Entity Information
- ➔ **Verify Entity Information**
- Business Information
- IRS Consent
- 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
- Small Business Certification
- Submit Registration

Page Description

Please carefully review the validated information associated with your entity. Once you select "Save and Continue" on this page, the validated information will appear in your entity's registration. You cannot change this information in SAM. If the information is incorrect, please select Cancel and make the necessary updates [here](#).

Details Entered by the User	Validated Details
DUNS: 123456789	DUNS: 123456789
Legal Business Name: Test University	Legal Business Name: Test University
Doing Business As: (none)	Doing Business As: (none)
Address Line 1: High Street	Address Line 1: High Street
Address Line 2:	Address Line 2:
City: Oxford	City: Oxford
State: Oxfordshire	State: Oxfordshire
ZIP/Postal Code: OX1 4AJ	ZIP/Postal Code: OX1 4AJ
Country: UNITED KINGDOM	Country: UNITED KINGDOM

CANCEL
SAVE AND CONTINUE

BACK TO USER DASHBOARD



SAM Steps

Core Data

- Everything with an * is mandatory and shows required format, in red.
- Physical address can be tricky if a Virtual Address is used. You have to talk to CAGE DLA during the validation phase to see if they will approve it. Issue is multiple entities at one location.

Register Entity

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

[BACK TO USER DASHBOARD](#)

Core Data

Entity Information

Page Description

Please enter the information associated with the unique identifier of the entity you want to register.

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 (D&B). For help, U.S. entities can contact D&B at 1-866-705-5711 or govt@dnb.com. International entities can email SAMhelp@dnb.com.

Entity Name:

A critical new step in entity validation requires each entity to self-report their Legal Business Name and Physical address.

Legal Business Name: *

Entity Physical Address:

Please enter the physical address associated with your entity. Your SAM registration will not be activated if you used a mailing address to get your DUNS Number.

Address Line 1: *

Address Line 2:

City: *

State/Province: *

ZIP/Postal Code: *

Country: *



SAM Steps

Core Data

- If grayed out, you cannot change it, coming from D&B or IRS.
- Marketing Partner ID Number (MPIN) – this is where you create it. Write it down, the MPIN will have to be used in other programs and to verify your information in SAM.

Register Entity
Core Data
Circle of Generations Inc

Business Information
DUNS: 080338766

Page Description

Please respond to questions on this page to better describe your entity. If you are required to provide a Taxpayer Identification Number (TIN), you may provide either an Employer Identification Number (EIN) or Social Security Number (SSN). Do not enter your SSN as your TIN unless you are a Sole Proprietor or a single-member Limited Liability Company (LLC) without an EIN. The TIN entered on this page will be sent to the IRS for validation after you complete the consent information on the next page.

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

Overview

Purpose of Registration

Core Data

- ✓ Entity Information
- ✓ Verify Entity Information
- ➔ **Business Information**
- IRS Consent
- CAGE or NCAGE Code
- General Information
- Financial Information
- Executive Compensation Questions
- Proceedings Questions
- SAM Search Authorization
- Review Core Data

Representations and Certifications

Points of Contact

Submit Registration

BACK TO USER DASHBOARD

Your Entity's Business Information:

Business Start Date (MM/DD/YYYY): *

Fiscal Year End Close Date (MM/DD): *

Company Division Name:

Company Division Number:

Corporate URL:

Congressional District: NC 05

Create/Enter MPIN: *

The MPIN will be shared with authorized partner applications (e.g. Grants.gov, Past Performance Information Retrieval System (PPIRS) etc.). The MPIN acts as your password in these systems and you should guard it as such. The MPIN must be nine characters long and contain at least one letter, one number, and no spaces or special characters.

▼ Physical Address - Pfafftown

Address Type:

Address Line 1:

Address Line 2:

City:

State/Province:

ZIP/Postal Code:

Country:



SAM Steps

Core Data

- It can be any address.

▼ Mailing Address

Address Type:

Address Line 1*:

Address Line 2:

City*:

State/Province*:

ZIP/Postal Code*:

Country*:

Taxpayer Identification Number (TIN):

Select your TIN Type. Most entities who pay U.S. taxes select Employer Identification Number (EIN). If you don't have one, you can [request an EIN online from the IRS](#) for free. If you are a Sole Proprietor or a single-member Limited Liability Company (LLC), you may select Social Security Number (SSN). Choose carefully. You cannot change your TIN Type once you navigate beyond this page.

TIN Type*: **Note:** If you select SSN as your TIN Type on this page, you must select either Sole Proprietorship or Limited Liability Company on the General Information page later during this registration.

TIN:



SAM Steps

Core Data

- Company Name and TIN must match what the IRS has.
- Why? If you owe money to the IRS and getting paid by the government, guess who gets paid first.

Purpose of Registration

Core Data

- ✓ Entity Information
- ✓ Verify Entity Information
- ✓ Business Information
- ➔ **IRS Consent**
- CAGE or NCAGE Code
- General Information
- Financial Information
- Executive Compensation Questions
- Proceedings Questions
- SAM Search Authorization
- Review Core Data

Representations and Certifications

Points of Contact

Submit Registration

[BACK TO USER DASHBOARD](#)

Page Description

Please carefully read the "Consent to Disclosure of Tax Information" on this page. Follow the instructions to provide the Taxpayer Information required for the most current tax year reported.

Upon completion of this page, all information required to perform the TIN Match will be sent to the IRS. Confirm all information is accurate before selecting Save and Continue. You will not be able to edit this page while the TIN Match is being performed.

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

CONSENT TO DISCLOSURE OF TAX INFORMATION

By entering my Marketing Partner Identification Number (MPIN) as my Signature below, pursuant to 26 U.S.C. 6103(c), I hereby authorize the Internal Revenue Service (IRS) to validate and disclose to the officers and employees of the System for Award Management (SAM) Program Office whether the name and/or name control and Taxpayer Identification Number (TIN) provided for this registration matches or does not match the name and/or name control and TIN maintained in the IRS files for [Entity Name] in the most current tax year reported.

I recognize this IRS-validated name and TIN, which is either my Employer Identification Number (EIN) or my Social Security Number (SSN) if I am a Sole Proprietor who chooses to use my SSN instead of getting an EIN or a single-member Limited Liability Company classified as a disregarded entity, will reside in 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. By providing the taxpayer information below in support of this TIN Match, I certify that I have the authority to execute this consent for disclosure for this tax return information.

TIN Match Instructions:

Provide the Taxpayer Information required for the most current tax year reported for this entity.

Your Taxpayer Name may be different than the entity's Legal Business Name. However, the Taxpayer Name must exactly match the name the IRS has on file for your entity's TIN according to its most recent tax return.

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.

Provide Taxpayer Information:

Taxpayer Name*:

Use only letters, numbers, spaces, hyphens (-), and ampersands (&). Omit any other special characters that are part of your Taxpayer Name.

Taxpayer Identification Number (TIN):



SAM Steps

Core Data

- Should match either physical or mailing, but can be another.
- Note the MPIN – has to be used.

Taxpayer Address: COPY MAILING ADDRESS COPY PHYSICAL ADDRESS

Address Line 1*:

Address Line 2:

City*:

State/Province*:

ZIP/Postal Code:

Country*:

Type of Tax:

Tax Year (YYYY)*:
(Insert Most Recent Tax Year)

Name of Individual Executing Consent*:

Title of the Individual Executing Consent*:

Signature*: Enter your MPIN here

Date*:

CANCEL PREVIOUS SAVE AND CONTINUE



SAM Steps

Core Data

- New Registration, you check no and leave CAGE blank.
- If have a CAGE, then enter it.

Page Description

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

If your entity already has a CAGE Code, provide it on this page. SAM will check to see if you entered a valid CAGE Code. If you want to search for CAGE Code information, go to the [DLA CAGE website](#). If you do not have a CAGE Code, one will be assigned by the DLA CAGE Program after you submit your entity registration.

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

Does your entity already have a CAGE Code? * Yes No

You may select Search to check the DLA CAGE database for the Legal Business Name and Physical Address associated with the CAGE Code you entered. Once you select Search, the page will reload and display any available match. This information is only displayed to help you confirm you entered the correct CAGE Code. If you do not want to use this CAGE Code, select Clear.

CAGE Code:



SAM Steps

Core Data

- Unless you have a Government certification, then none.
- Do not check things just because. You have to have certifications to check the boxes.

Page Description

Please describe the entity you are registering. Use the drop-down menus and check boxes to make your selections.

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

Country of Incorporation: UNITED STATES ▼

State of Incorporation: * ALABAMA ▼

Company Security Level: Government Non-Classified ▼

Highest Employee Security Level: Government Confidential ▼

Entity Type:
You categorized your entity as: **Business or Organization**. Further describe your entity by selecting the relevant business types.

Institution Type:
Does your entity qualify as one of the following institution types? If none of these apply, select Not Applicable.

Foundation ▼

Disadvantaged Business Enterprise:
Is your entity certified by a state certifying agency as a Department of Transportation Disadvantaged Business Enterprise?

No ▼

Native American Entity Type:
If your organization is a Federally Recognized Native American Entity, choose all that apply:

- Alaskan Native Corporation Owned Firm
- American Indian Owned
- Indian Tribe (Federally Recognized)
- Native Hawaiian Organization Owned Firm
- Tribally Owned Firm



Types of Small Business

<http://www.sba.gov/aboutsba/sbaprograms/goals/index.html>

- Small Business (SB) – 23%
- Small Disadvantaged Business (SDB) – 11%
 - 8(a) – part of the SDB Goal – not statutory
- Woman Owned Small Business (WOSB) – 5%
- Historically Underutilized Business Zone Small Business (HUBZone) – 3%
- Service Disabled Veteran Owned Small Business (SDVOSB) – 3%



SAM Steps



CROSS TIMBERS
Procurement Technical Assistance Center

- Check what applies.
- Remember to check a Socio-Economic Category, if the entity has 51% ownership in that category and holds the highest office.

6 February 2023

Organization Factors:

Do one or more of these organization factors apply to your entity? If none of these apply, select Not Applicable. NOTE: If you are a Manufacturer of Goods, you may also make one other selection. First select Manufacturer of Goods, then another drop down box will display for your next selection.

Manufacturer of Goods ▼

Is your business/organization also any one of the following? If none of these values apply to your entity, select Not Applicable from the drop-down menu.

Small Agricultural Cooperative ▼

Entity Structure:

What is the form of your entity as defined by the IRS? *

Corporate Entity, Tax Exempt ▼

Profit Structure:

What is your entity's profit structure? *

For-Profit Organization ▼

Socio-Economic Categories:

Select any socio-economic categories which reflect the current status of your entity. If applicable, your small business status will automatically be derived from the receipts, number of employees, assets, or megawatt hours, and NAICS codes entered in the Assertions portion of the registration and displayed in the Representations and Certifications portion of this registration.

- Veteran Owned Business
- Woman Owned Business
- Joint Venture Women-Owned Small Business
- Joint Venture Economically Disadvantaged Women-Owned Small Business
- Community Development Corporation Owned Firm
- Minority Owned Business

CANCEL

PREVIOUS

SAVE AND CONTINUE



SAM Steps

Core Data

- Check – Credit Cards as YES. If a flea market can take credit cards, so can you.
- If red * mandatory.
- Match the format shown on the right side.
- A Remittance Mailing Address must be supplied in the unlikely event that a check is to be mailed to you.

Register Entity

Do you accept credit cards as a method of payment? * Yes No

Overview

Purpose of Registration

Core Data

- ✓ Entity Information
- ✓ Verify Entity Information
- ✓ Business Information
- ✓ IRS Consent
- ✓ CAGE or NCAGE Code
- ✓ General Information
- Financial Information**
- Executive Compensation Questions
- Proceedings Questions
- SAM Search Authorization
- Review Core Data

Representations and Certifications

Points of Contact

Submit Registration

[BACK TO USER DASHBOARD](#)

New Account

Electronic Funds Transfer (EFT):

Account Type: *

Financial Institute:

ABA Routing Number: *

Account Number: *

Lockbox Number:

Automated Clearing House (ACH):

Please enter at least one method of contact for your A.C.H below.

A.C.H U.S. Phone: * (xxx)xxx-xxxx

A.C.H Non-U.S. Phone: xxx-xxxx-xxxxxxx

A.C.H Fax: (xxx)xxx-xxxx

A.C.H Email:

Remittance Address:

Name: *

Address Line 1: *

Address Line 2:

City: *

State/Province *

Country: *

ZIP/Postal Code:



SAM Steps

Core Data

This is because of the companies making millions and majority going to the CEO.

Register Entity	Page Description
Overview	<p>Please answer the questions below to determine if you need to provide total compensation details for the five (5) most highly compensated executives in your business or organization. In accordance with the Federal Funding Accountability and Transparency Act (FFATA) of 2006, as amended in 2008, your responses will be displayed to the public on USAspending.gov in association with any eligible Federal award your entity receives.</p> <p><u>Executive Compensation:</u></p> <p>In your business or organization's preceding completed fiscal year, did your business or organization (the legal entity to which this specific SAM record, represented by a DUNS number, belongs) receive both of the following:</p> <ol style="list-style-type: none"> 1. 80 percent or more of your annual gross revenues in U.S. federal contracts, subcontracts, loans, grants, subgrants, and/or cooperative agreements and 2. \$25,000,000 or more in annual gross revenues from U.S. federal contracts, subcontracts, loans, grants, subgrants, and/or cooperative agreements? * <p>Please select a value ▼</p> <p>Does the public have access to information about the compensation of the senior executives in your business or organization (the legal entity to which this specific SAM record, represented by a DUNS number, belongs) through periodic reports filed under section 13(a) or 15(d) of the Securities Exchange Act of 1934 (15 U.S.C. 78m(a), 78o(d)) or section 6104 of the Internal Revenue Code of 1986?</p> <p>Not Applicable ▼</p>
Purpose of Registration	
Core Data	
✓ Entity Information	
✓ Verify Entity Information	
✓ Business Information	
✓ IRS Consent	
✓ CAGE or NCAGE Code	
✓ General Information	
✓ Financial Information	
→ Executive Compensation Questions	
● Proceedings Questions	
● SAM Search Authorization	
● Review Core Data	
Representations and Certifications	
Points of Contact	
Submit Registration	



SAM Steps

Core Data

Page Description

Please answer the following Proceedings questions about the entity you are registering. SAM collects information about proceedings only if you meet the conditions set forth in FAR 52.209-7, FAR 52.209-9, or 2 C.F.R. 200 Appendix XII. This information is not displayed in SAM. It is sent to FAPIIS.gov for display as applicable.

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

Proceedings:

Is there a Federal solicitation on which your business or organization, as represented by the DUNS number on this specific SAM record, is bidding that contains the FAR provision 52.209-7, or has your business or organization, as represented by the DUNS number on this specific SAM record, been awarded a Federal contract or assistance award that contains the award term and condition described in 2 C.F.R. 200 Appendix XII? *

Yes ▼

Does your business or organization, as represented by the DUNS number on this specific SAM record, have current active Federal contracts and/or grants with total value (including any exercised/unexercised options) greater than \$10,000,000? *

Yes ▼

Within the last five years, had the business or organization (represented by the DUNS number on this specific SAM record) and/or any of its principals, in connection with the award to or performance by the business or organization of a Federal contract or grant, been the subject of a Federal or State

1. Criminal proceeding resulting in a conviction or other acknowledgment of fault;
2. Civil proceeding resulting in a finding of fault with a monetary fine, penalty, reimbursement, restitution, and/or damages greater than \$5,000, or other acknowledgment of fault; and/or
3. Administrative proceeding resulting in a finding of fault with either a monetary fine or penalty greater than \$5,000 or reimbursement, restitution, or damages greater than \$100,000, or other acknowledgment of fault? *

No ▼

CANCEL

PREVIOUS

SAVE AND CONTINUE



SAM Steps

Core Data

- You have to check here; otherwise, Cross Timbers cannot see your information.
- Contracting officers will not be able to see your information easily.

Register Entity	Page Description
Overview	<p>If you feel displaying non-sensitive information like your registration status, legal business name, and physical address in the search engine results poses a security threat or danger to you or your organization, you can restrict the public viewing of your record in SAM's search engine. However, your non-sensitive registration information remains available under the Freedom of Information Act to those who download the SAM public data file. Learn more about SAM public search results.</p>
Purpose of Registration	
Core Data	
✓ Entity Information	<p><input checked="" type="checkbox"/> Include my entity's non-sensitive information in SAM public search engine results and the public data file. I want to maximize my business opportunities with the U.S. government and other partners. If I uncheck this box, my entity's non-sensitive information will only be available to the public in the SAM public data file.</p> <p>NOTE: SAM never releases sensitive information, such as your Taxpayer Identification Number or banking information for electronic funds transfer, to the public in either its public search view or public data file. Sensitive information is only available to authorized U.S. government officials.</p>
✓ Verify Entity Information	
✓ Business Information	
✓ IRS Consent	
✓ CAGE or NCAGE Code	
✓ General Information	
✓ Financial Information	
✓ Executive Compensation Questions	
✓ Proceedings Questions	
→ SAM Search Authorization	
● Review Core Data	
	<p><input type="button" value="CANCEL"/> <input type="button" value="PREVIOUS"/> <input type="button" value="SAVE AND CONTINUE"/></p>



SAM Steps

Assertions

- Make sure relevant to your company.
- DO NOT put 10 or more.
- Look at similar companies to see what they entered.
- You can change as you need.

Page Description

Please describe the Goods and Services your entity provides by selecting relevant North American Industry Classification System (NAICS) Codes. You may also select Product and Service Codes (PSCs). In the "Search for NAICS Code" or "Search for PSC" text box, you may enter the code or a word describing the type of services your business offers. Once you find the NAICS Codes or PSCs that are applicable to your entity select Add to include those codes in your entity's registration. Codes you have successfully added to your registration will show up in the "NAICS Codes Selected" or "Product and Service Codes Selected" boxes. If you need to delete a NAICS Code or PSC, you may select Remove for the chosen code.

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

Add NAICS Codes: *

Search for NAICS Code:

SEARCH CLEAR

NAICS Codes Selected			
Mark as Primary	NAICS Code	Description	Action
<input checked="" type="radio"/>	713920	SKIING FACILITIES	REMOVE



SAM Steps

Assertions

- This determines if you are small with your primary NAICS code.
- Do not touch Optional, unless you have several locations.
- Total Receipts is GROSS, not NET.

Page Description	
Please enter Size Information for the Entity you are registering.	
World-Wide Organizational Data, including all applicable affiliates (Required). The following information will be used to derive your business size status based on SBA size standards.	
Please enter the world-wide data for your organization to include parent, all affiliates, and all locations including your individual location. If you enter Location information below, the numbers you enter for world-wide must be greater than or equal to the numbers entered in the location size.	
Total Receipts (3 year average):	
Total Number of Employees (12 month average):	
Penalties for misrepresentation as a small business include fines of not more than \$500,000 or imprisonment for not more than 10 years, or both; administrative remedies; and suspension and debarment as specified in subpart 9.4 of title 48, Code of Federal Regulations. For more information on Number of Employees see (FAR 19.101) .	
Location (Optional)	
The Small Business Administration may use this information for programs such as HUBZone and Small Business Size Status Determinations. Please enter the following data for the location on this registration.	
Receipts (3 year average) at this Location:	
Number of Employees (12 month average) at this Location:	
Industry-Specific Size Metrics (Present the following fields at the bottom of the page:)	
Barrels Capacity: (NAICS code 324110)	
Total Assets: (One or more of following NAICS Codes: 522110, 522120, 522130, 522190, 522210, 522293)	
<u>World Wide:</u>	
Total Receipts (3 year average): *	\$ <input type="text"/>
Average Number of Employees (12 month average): *	<input type="text"/>
<u>Location (Optional):</u>	
Annual Receipts (3 Year Average):	\$ <input type="text"/>
Average Number of employees (12 Month Average):	<input type="text"/>



SAM Steps

Assertions

- Electronic Data Interchange (EDI) is not free and you do not need it.
- This is for big companies and used prior to web based systems.

Register Entity	EDI Information	
	DUNS: <input type="text"/>	CAGE Code: <input type="text"/>
Registration Overview	Page Description	
Purpose of Registration	Please enter the requested information below for your entry.	
Core Data		
Assertions	Do you wish to enter EDI Information for your non-government entity?*	
● Goods and Services	<input type="text" value="No"/>	
● Size Metrics	<u>EDI Information:</u>	
→ EDI Information	EDI VAN Provider:	<input type="text"/>
● Disaster Response Information	ISA Qualifier:	<input type="text"/>
● Review Assertions	ISA Identifier:	<input type="text"/>
Representations and Certifications	Functional Group Identifier:	<input type="text"/>
Points of Contact	820s Request Flag:	<input type="text" value="Please select a value"/>
	<input type="button" value="CANCEL"/>	<input type="button" value="PREVIOUS"/> <input style="background-color: #003366; color: white;" type="button" value="SAVE AND CONTINUE"/>



SAM Steps

Assertions

- Do this - this is how FEMA finds you.
- Do bonding levels, based on your liability insurance.
- Select locations based on what you do.
- Do not do Any State, if possible.

Registration Overview	Page Description
Purpose of Registration	Complete this section if you want to be listed in the Disaster Response Registry to potentially provide debris removal, distribution of supplies, reconstruction, and other disaster or emergency relief services in the event of a national disaster.
Core Data	
Assertions	
✓ Goods and Services	Do you wish to be included in the Disaster Response Registry? * <input type="text" value="Yes"/>
✓ Size Metrics	Does your company require bonding to bid on Contracts? * <input type="text" value="No"/>
✓ EDI Information	Bonding Level: Please provide the bonding level type, value must be input in whole dollars.
✓ Disaster Response Information	<input type="checkbox"/> Construction Bonding Level, Per Contract (dollars) <input type="text"/>
✓ Review Assertions	<input type="checkbox"/> Construction Bonding Level, Aggregate (dollars) <input type="text"/>
Representations and Certifications	<input type="checkbox"/> Service Bonding Level, Per Contract (dollars) <input type="text"/>
Points of Contact	<input type="checkbox"/> Service Bonding Level, Aggregate (dollars) <input type="text"/>
Small Business Certification	Geographic Area Served: * Select where your entity can provide disaster responses services. If you select "Any State", you are saying your organization can perform in any declared disaster area nationwide. Alternatively, you can narrow the geographic area you serve to three or less states. If you narrow your area served down to just one state, you can further restrict it to specific counties or metropolitan statistical areas.
Submit Certification	<input type="radio"/> Any State <input checked="" type="radio"/> One State <input type="radio"/> Multiple States
BACK TO USER DASHBOARD	State: <input type="text" value="Please select a value"/> County: <input type="text" value="Please select a value"/> Metropolitan Statistical Area: <input type="text"/> County: <input type="text" value="Please select a value"/> Metropolitan Statistical Area: <input type="text"/> County: <input type="text" value="Please select a value"/> Metropolitan Statistical Area: <input type="text"/>



SAM Steps

Representations and Certifications

- This is something that will result in saving 20 pages when you submit a bid.
- Over 43 questions.
- The Federal Acquisition Regulations (FAR) and Defense Federal Acquisition Regulations (DFAR) provide guidance on government contracting.

1. Who are the person(s) within: <ENTITY NAME> responsible for determining prices offered in bids/proposals? ([FAR 52.203-2](#))

▼ Person

Name :

Title :

***You must click Save and Continue below to complete desired action.**

2. Does: <ENTITY NAME> have other plants/facilities at different addresses routinely used to perform on contracts? ([FAR 52.214-14](#), [FAR 52.215-6](#))

If yes, please provide the following: Place of Performance (Address) of the Other Plants/Facilities, Name(s) of Owner and Operator of Plant/Facilities, Address(es) of Owner and Operator of Plant/Facilities (Street, Address, City, County, State, Zip Code)

3. TIN is on file. ([FAR 52.204-3](#), [FAR 52.212-3](#))

4. For products designated by the Environmental Protection Agency and provided by <ENTITY NAME> , does the percentage of recovered material content meet the applicable EPA guidelines? ([FAR 52.223-4](#), [FAR 52.223-9](#))



SAM Steps

Representations and Certifications

- Around question 17 is what will provide the Self Certifying Small Disadvantaged Business on your profile.
- Answers to questions are:
 - Yes
 - No
 - Vendor will Provide Information with Specific Offers to the Government.

16. Our records indicate that <ENTITY NAME> has selected the Entity Structure type of Sole Proprietorship ([FAR 52.204-3](#), [FAR 52.212-3](#))

17. Are you a Small Disadvantaged Business?

The answers below regarding your small business status ("Small" or "Other than Small") are pre-filled based on your previously entered size standard information (number of employees and total receipts).

When you answer the question on your Small Disadvantaged Business status, you are doing so for each NAICS for which you have been identified as "small".

The NAICS for which you are identified as small are shown in the table below; these Y/N answers are located in the "Small Business?" column where a "Y" indicates "Small" and "N" indicates "Other than Small". These answers are derived from the SBA's size standards.

The NAICS shown are those you have entered. You may click the "View More" button to see your entity's size status for any existing NAICS. If you disagree with any of the pre-filled information, you must return to Assertions and change your values there.

The "Edit" button will return you to the correct location to make these changes.

([FAR 52.212-3](#))

EDIT

NAICS Code	Name	NAICS Exception	Size Standard	Small Business?
212321	CONSTRUCTION SAND AND GRAVEL MINING		500	Y
212322	INDUSTRIAL SAND MINING		500	Y

VIEW MORE

Please select a value ▼

18. Reserved.



SAM Steps

Representations and Certifications

- At the end, after all questions have been answered, you have to certify you have read each of the FAR and DFARS.
- Whoever logged in will be the one whose name will appear.

[FAR 52.222-52: Exemption from Application of the Service Contract Labor Standards to Contracts for Certain Services-Certification.](#)

[FAR 52.223-4: Recovered Material Certification](#)

[FAR 52.223-9: Estimate of Percentage of Recovered Material Content for EPA-Designated Items \(Alternate I\)](#)

[FAR 52.223-22: Public Disclosure of Greenhouse Gas Emissions and Reduction Goals-Representation.](#)

[FAR 52.225-2: Buy American Certificate](#)

[FAR 52.225-4: Buy American-Free Trade Agreements-Israeli Trade Act Certificate](#)

[FAR 52.225-6: Trade Agreements Certificate](#)

[FAR 52.226-2: Historically Black College or University and Minority Institution Representation](#)

[FAR 52.227-15: Representation of Limited Rights Data and Restricted Computer Software](#)

- I have read each of the FAR and DFARS provisions presented on this page. By submitting this certification, I, _____, am attesting to the accuracy of the representations and certifications contained herein, including the entire NAICS table. I understand that I may be subject to criminal prosecution under Section 1001, Title 18 of the United States Code or civil liability under the False Claims Act if I misrepresent _____ in any of these representations or certifications to the Government.

CANCEL

PREVIOUS

SAVE AND CONTINUE



SAM Steps

Representations and Certifications

- This was added to show if your entity is receiving any aid.
- Question is what is happening with the Paycheck Protection Program (PPP) and how to answer this.
- Your call, SBA has not provided guidance yet.

Representations and Certifications

Financial Assistance Response

Page Description

This page provides a common set of certifications and representations required by Federal statutes or regulations in accordance with the grants guidance under Title 2 of the Code of Federal Regulations (2 CFR 200.208 Certifications and Representations). If you intend to apply for, or are already a recipient of a Federal grant or agreement, you must agree to the following grants certifications and representations.

You are required to keep these grants certifications and representations current, accurate, and complete as part of your entity registration in SAM. Note, these may not include all federal requirements that apply to your project or program. Federal assistance awarding agencies will notify you if they require additional certifications. If you have questions, please contact the awarding agency as applicable.

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

Does **[Legal Business Name]** wish to apply for a Federal financial assistance project or program, or is **[Legal Business Name]** currently the recipient of funding under any Federal financial assistance project or program?*

Yes

No



SAM Steps

Points of Contact

- Fill out all POCs, including Optional. Shows attention to detail.
- If Sole Proprietor – just list Prime, leave Optional blank.
- LLC or more, list two people.
- DO NOT list a bunch of people.

POC Name	Mandatory?	Mandatory Data Elements
Accounts Receivable POC	Mandatory	First Name, Last Name, Email, and Phone
EDI POC	Mandatory if business wants to be EDI capable	First Name, Last Name, Email, Address, City, Country., Phone, State/Province (if US or Canada), and ZIP/Postal Code
Electronic Business POC	Mandatory	First Name, Last Name, Email, Address, City, Country., Phone, State/Province (if US or Canada), and ZIP/Postal Code
Electronic Business Alternate POC	Optional	First Name, Last Name, Email, Address, City, Country., Phone, State/Province (if US or Canada), and ZIP/Postal Code
Government Business POC	Mandatory	First Name, Last Name, Email, Address, City, Country., Phone, State/Province (if US or Canada), and ZIP/Postal Code
Government Business Alternate POC	Optional	First Name, Last Name, Email, Address, City, Country. Phone, State/Province (if US or Canada), and ZIP/Postal Code.
Party Performing Certification POC	Mandatory if you have used a 3rd party certifier for a small business certification.	First Name, Last Name, Email, Address, City, Country. Phone, State/Province (if US or Canada), and ZIP/Postal Code.
Past Performance POC	Optional	First Name, Last Name, Email, Address, City, Country. Phone, State/Province (if US or Canada), and ZIP/Postal Code.
Past Performance Alternate POC	Optional	First Name, Last Name, Email, Address, City, Country. Phone, State/Province (if US or Canada), and ZIP/Postal Code.
Proceedings POC	Mandatory if you have entered proceedings details.	First Name, Last Name, Email, Address, City, Country. Phone, State/Province (if US or Canada), and ZIP/Postal Code.
Proceedings Alternate POC	Optional	First Name, Last Name, Email, Address, City, Country. Phone, State/Province (if US or Canada), and ZIP/Postal Code.
Sole Proprietorship POC	Mandatory if Sole Proprietor has been selected as a business type.	First Name, Last Name, Email, and Phone



SAM Steps

Points of Contact

- Ensure you format correctly – capitalization and punctuation.
- When logged in, it will allow you to copy and paste your information for each POC.

Government Business POC	
Title:	Ms
First Name:	Janice
Middle Name:	
Last Name:	Huffman
US Phone:	(936)633-5412
Extension:	
NON US Phone:	
Notes:	Grants and Sponsored Programs Director
Address Line 1:	PO BOX 1768
Address Line 2:	
City:	LUFKIN
State/Province:	TX
Country:	UNITED STATES
ZIP/Postal Code:	75902 - 1768

Electronic Business POC	
Title:	owner
First Name:	donald
Middle Name:	R
Last Name:	Sanders
US Phone:	(713)857-8994
Extension:	
NON US Phone:	
Notes:	
Address Line 1:	PO Box 300821
Address Line 2:	
City:	Houston
State/Province:	TX
Country:	UNITED STATES
ZIP/Postal Code:	77230



SAM Steps

Points of Contact

- Ensure you format correctly – capitalization and punctuation.
- When logged in, it will allow you to copy and paste your information for each POC.

Government Business POC	
Title:	Ms
First Name:	Janice
Middle Name:	
Last Name:	Huffman
US Phone:	(936)633-5412
Extension:	
NON US Phone:	
Notes:	Grants and Sponsored Programs Director
Address Line 1:	PO BOX 1768
Address Line 2:	
City:	LUFKIN
State/Province:	TX
Country:	UNITED STATES
ZIP/Postal Code:	75902 - 1768

Points of Contact:

Copy From:

Title:

First Name:*

Middle Initial:

Last Name:*

Email:*



SAM Steps

SBA Supplemental Page

- See this after the POC Page.
- The SBA Profile is where Contracting Officers go to search for additional information on Vendors.
- SBA no longer supports a direct link to the SBA Profile.
- Must go to SBA General Login System

View assistance for SBA Supplemental - SBA Supplemental

An official website of the United States government [Here's how you know](#)

SAM.GOV

Home Search Databank Data Services Help

Register Entity

Core Data

Assertions

Representations and Certifications

Points of Contact

Small Business Certification

✓ SBA Profile

Submit Registration

Back to Workspace

SBA Supplemental ROLLINS JAMES R

SBA Supplemental Unique Entity ID: EKFSRTAMGJJ3 CAGE Code: 7KF14

Page Description

ATTENTION SMALL BUSINESSES: Do you want to further promote your business? The Small Business Administration (SBA) offers a government website called the Dynamic Small Business Search (DSBS). Government contracting/purchasing officials use DSBS in their market research to find viable small businesses for their contracting needs. DSBS collects and provides supplemental information about your company including past work performance, client referrals, and detailed capabilities statements; information that could reduce the selection process time. Federal prime contractors also use the DSBS to find small businesses to include in their subcontracting plans.

Register or Update Your Firm's SBA Profile in the Dynamic Small Business Search (DSBS)

- Who should complete an SBA Profile in the DSBS?
 - **REQUIRED:** Firms applying for SBA certification as HUBZone, 8(a) Business Development, or 8(a) Joint Venture Program or self-certifying as WOSB or EDWOSB for the WOSB Federal Contracting Program must complete the SBA Supplemental Pages to register or update their SBA Profile.
 - **OPTIONAL:** We highly recommend all small businesses complete the SBA Supplemental Pages to register or update their SBA Profile.
- How do I complete an SBA Profile in the DSBS?
 - Select Register or Update SBA Profile on this page. This will open a new window and take you directly to the SBA Supplemental Pages for your entity. Please remember to come back to the SAM window to complete and submit your entity registration.
- How do I know if my entity gets an SBA certification?
 - 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 will be updated. You will be instructed to review the changes and re-certify to your entity's small business status.

The SBA Supplemental Page link is currently unavailable. Please [visit SBA](#) directly if you need to update your profile.

Cancel Previous Save and Continue



SAM Steps

SBA General Login System

- There are two different ways to access your SBA Profile:
 - SBA General Login System:
 - https://eweb.sba.gov/gls/dsp_login.cfm?sb=Y
 - This requires a different User ID and Password than SAM.GOV and LOGIN.GOV
 - SBA Connect:
 - <https://connect.sba.gov/Home/Index>
 - This uses your LOGIN.GOV
- Another hoop – but does get you into the SBA system.



SAM Steps

SBA General Login System

https://eweb.sba.gov/gls/dsp_login.cfm?sb=Y

The screenshot shows the SBA General Login System interface. At the top, there is a navigation bar with the SBA logo, "General Login System", and links for "Print" and "Help". A date "September 15, 2022" is displayed on the left. A message states: "The WOSB and EDWOSB certification applications have been moved to certify.sba.gov. To access the new system, please [CLICK HERE](#)." Below this, a thank you message from the U.S. Small Business Administration is shown. A notice indicates that starting May 17, 2021, the EDMS system will be retired and moved to a new interface. The main content area features a "SBA Account Login" form with fields for "User ID" and "Password", and "Login" and "Clear" buttons. A "Text Only" link is located below the form. On the left side, there is a blue sidebar with navigation links: "Forgot User ID?", "Forgot or Expired Password?", "GLS Instructions for:", "Banking Partners", "Small Businessses", "SBA Employees and SBA Contractors", "Create New SBA GLS Account", and "Contact Program Offices". At the bottom, there is a footer with "Last modified: 06/16/2021 12:00:00 AM", navigation links for "FirstGov", "E-Gov", "Regulations.gov", and "White House", and a status bar indicating "SBA Processing: 0.126 seconds" and "Session probably timed out".



SAM Steps SBA Connect

Welcome

SBA Connect is a web-based application designed to provide secure Single Sign On capabilities for SBA users. It allows users to log in once and have access to multiple applications based on their role in the organization.

External Users

 Sign in with login.gov

Don't have a login.gov account? [Create an account](#)

SBA Employees/Contractors

LOGIN



Do you need more information

I need more information about SBA Debt Relief I need more information on the Paycheck Protection Program

I need more information about SBA Express Bridge Loans

I need more information on the Economic Injury Disaster Loans

I need to know about SBA COVID Funding Options established by the CARES Act

I need to apply for an SBA Disaster Loan I need Small Business Guidance & Loan Resources

I need Disaster Assistance information



SAM Steps

SBA Supplemental Page

- https://pro-net.sba.gov/pro-net/update/dsp_editprofile.cfm

The screenshot shows the SBA Supplemental Pages website. At the top, there is a navigation bar with "Skip Navigation" and "Accessibility Options" links, and buttons for "Search", "Print", "Exit", and "Help". The main header includes the SBA logo and "Update SBA Profile". A welcome message for "Rollins, James R" is displayed. A left-hand navigation menu lists various sections: "SBA Supplemental Pages", "Orientation/Help", "Mandatory Data", "Identification Data", "Organization, Ownersh...", "Products & Services", "References", and "End". The main content area is titled "Welcome to the SBA Supplemental Pages" and "The SBA supports Small Businesses". It provides information on eligibility for registration with the U.S. Small Business Administration, including a list of criteria and a notice regarding penalties for misrepresentation. It also defines a "Small Business" according to Title 13 of the Code of Federal Regulations and provides a link for determining business size. A section on "Cookies, JavaScript and Frames" explains the requirements for using the site. Finally, it discusses "Data Entry Forms" and identifies mandatory fields.



SAM Steps

Submit Registration

- Your record is NOT yet active or submitted.
- Review your profile.
- Then Submit

Register Entity | **Submit Registration** | **Group, LLC**

Confirmation Page | DUNS: .

Overview

Purpose of Registration

Core Data

Assertions

Representations and Certifications

Points of Contact

Small Business Certification

Submit Registration

Entity Review

Confirmation Page

BACK TO USER DASHBOARD

Registration Submitted - Confirmation
Fri Sep 08 14:25:18 EDT 2017

You successfully submitted your entity registration. This registration record will remain in Submitted status until all external validations are complete. This process is entirely FREE to you. It is FREE to register and maintain your registration in SAM. It is FREE to get help with your registration.

What happens next?

- 1 If you provided a Taxpayer Identification Number (TIN), the Internal Revenue Service (IRS) will conduct a validation of your TIN and Taxpayer Name. This could take two business days. You will get an email from @sam.gov when that review is complete.
- 2 Your registration will then be sent to the Defense Logistics Agency (DLA) Commercial and Government Entity (CAGE) Code system for assignment or validation of your CAGE Code. This also is a FREE service. This step averages two business days, but the DLA CAGE team can take up to ten business days, or longer, in peak periods. You will get an email from @sam.gov when that review is complete.
- 3 If the DLA CAGE team has any questions, they will contact the individual you listed as the Government Business Point of Contact (POC) via email. The email will come from an @dla.mil address. Please tell your Government Business POC to respond right away to any requests from an @dla.mil email. If a timely response is not received, your registration will be returned to SAM and your registration status changed to Work in Progress. You will have to resubmit and provide the requested information to DLA CAGE to continue.
- 4 You will get an email from @sam.gov when your registration passes these external validations and becomes Active. While you are waiting, use the Check Status tab in the SAM main navigation bar to see where your registration is in the review process.
- 5 Remember, it is FREE to register and maintain your registration in SAM. If you get an email from any address that does not end in .gov or .mil, be cautious. If you get an email, text message, or phone call asking for money or payment of any amount, be very cautious. These parties do not represent the U.S. government. You engage third party vendors at your own risk.



SAM Steps

Submit Registration

- You will see this after the submit your registration.
- This is how you know that you have submitted your SAM registration.

James Rollins [Log Out](#)

SAMSM
SYSTEM FOR AWARD MANAGEMENT

[MY SAM](#) [SEARCH RECORDS](#) [DATA ACCESS](#) [CHECK STATUS](#) [ABOUT](#) [HELP](#)

ALERT: SAM.gov will be down for scheduled maintenance Saturday, 06/27/2020 from 8:00 AM to 8:00 PM.

ALERT: CAGE is experiencing intermittent service interruptions. SAM registrants may encounter an error validating a CAGE Code. If this happens, please try again later.

MY SAM **Update Entity POCs**
Confirmation

Confirmation
Wed Jun 24 22:17:28 EDT 2020

Thank you for updating the POCs for your entity registration. Your changes have been saved.
NOTE: The entity registration status has NOT been changed. You will need to update the entity prior to the set expiration date.
Use the **Done** button to continue.

[PRINT](#) [DONE](#)

GSA
IBM-P-20200424-1037
WWW5

[Search Records](#) [Disclaimers](#) [FAPIS.gov](#)
[Data Access](#) [Accessibility](#) [GSA.gov/IAE](#)
[Check Status](#) [Privacy Policy](#) [GSA.gov](#)
[About](#) [USA.gov](#)
[Help](#)



SAM Steps

Validation of Submission

- You will receive an email from samadmin@sam.gov telling you that the IRS TIN Match Validation was successful.
- Then you will receive another email from samadmin@sam.gov that says your Registration has been Activated.



SAM Steps

Check Status of Registration

- Click on Check Registration Status.

The screenshot shows the SAM.GOV website interface. At the top, there is a navigation bar with links for Home, Search, Data Bank, Data Services, and Help. The SAM.GOV logo is prominently displayed on the left. A banner on the right states 'Official U.S. Government Website 100% Free'. The main content area is divided into two columns. The left column lists various services: Contract Opportunities (was fbo.gov), Contract Data (Reports ONLY from fpds.gov), Wage Determinations (was wdol.gov), Federal Hierarchy (Departments and Subtiers), Assistance Listings (was cfda.gov), Entity Information (Entities, Disaster Response Registry, and Exclusions), and Entity Reporting (SCR and Bio-Preferred Reporting). The right column features a 'NEW Learn More' link above a section titled 'Register Your Entity or Get a Unique Entity ID'. This section includes a sub-header 'Register your entity or get a Unique Entity ID to get started doing business with the federal government.' and three buttons: 'Get Started', 'Renew Entity', and 'Check Registration Status'. A red arrow points from the bullet point in the list above to the 'Check Registration Status' button.



SAM Steps

Check Status of Registration

- Once you login to SAM.GOV
- Go to the Workspace
- The bubbles show your status for registrations
- Active Registration – you are good to go
- Work in Progress – means you do not have it submitted yet, have to go back into your profile to complete it
- Submitted Registration – it has been submitted, but now going through reviews

The screenshot shows the SAM.GOV workspace interface. At the top, there is a navigation bar with links for Home, Search, Data Bank, Data Services, and Help. Below this is the 'Workspace' section, which contains a 'Entities' dashboard. The dashboard features six colored bubbles representing different registration statuses: Active Registration (1), ID Assigned (0), Inactive Registration (0), Pending ID Assignment (0), Work in Progress Registration (0), and Submitted Registration (0). To the right of these bubbles, a text box indicates the next update due date as Dec 2, 2023, and the number of entities due in the next 30 days as 0. Below the dashboard, there are two main action areas: 'Register Your Entity or Get a Unique Entity ID' with a 'Get Started' button and a link to 'What do I need for registration?'; and 'Renew/Update Your Entities' with a 'Renew/Update' button and a link to 'How to renew or update an entity?'. The 'Get Started' and 'Renew/Update' buttons are highlighted in green.



SAM Steps HELP

- 866-606-8220
- Need to have the following information to validate you have access to the Entity Registration:
 - UEI #
 - Business Name
 - Email Address
 - Bank Information

SAM.GOV Requests Notifications Workspace Sign Out

Home Search Data Bank Data Services **Help**

Help

1 Use SAM.gov self help options

Search
Search help articles to find answers to your questions.

Explore
Explore a menu of our most popular help topics.

2 Ask the federal service desk

Go to FSD

Go to FSD to

- Get help with your account
- Resolve technical issues
- Create and manage help desk tickets
- Chat with a help desk agent

Please do not contact FSD.gov about specific contracts, opportunities, or agency processes.

Official U.S. Government Website
100% Free

Help Topic Trends

- Validate My Entity **NEW**
- Transition from DUNS to Unique Entity ID
- Register your entity to get started with government contracts and assistance
- FAQs for help with login
- Supported Browsers
- Most Searched Articles

Find What's New in SAM.gov

- View Release Notes
- View Blogs
- View All IAE System Announcements
- GSA Twitter
- GSA LinkedIn



Helpful Hints

- UEI, DUNS number, & SAM registration are free – do not provide a payment to commercial companies! Going rate is about \$599, highest \$3,500.
- D&B & SAM registrations will trigger for-profit businesses trying to sell their services:
 - Very aggressive in their sales strategies!!
 - “FedBiz Access”, “US Federal Contractor Registration”, “Federal Contractor Registry”, “FedContractor”, “United States Business Registration”, “Federal Award Management Registration”, and many more
- Fraudulent SAM website: “sam-gov.org”
- Valid is “.mil”, “.gov”, “.org”, “.edu”, and sometimes, if the government has outsourced a “.com”.
- You do not need these services to pursue government contracts. Registration is Free! Be careful what you pay for. Use critical thinking (Common Sense) and contact us when you are not sure!



How to Contact Us

- **Mail and Location:**

UTA Cross Timbers APEX Accelerator (Effective 1 Feb 2023)
University of Texas at Arlington Research Institute (UTARI)
7300 Jack Newell Boulevard South
Fort Worth, TX 76118-7115

- **Telephone:**

(817) 272-5978

Fax: (817) 272-5977

- **E-mail:**

crosstimbers@uta.edu – Main Email

james.rollins@uta.edu – James R. (Jim Bob) Rollins

- **Website:**

www.uta.edu/crosstimbers

- **Request for Assistance Form:**

https://center-gateway.com/2/gateway/047000/application_form

- **Locate APEX Accelerators in your Area:**

<https://www.aptac-us.org/>





CROSS TIMBERS
Procurement Technical Assistance Center

APEX
ACCELERATORS



CROSS TIMBERS

APEX Accelerator