

"On the Road Again -Industry & Government Travel Rebounds"



GovTravels Academy Survey



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- Find this Travel Academy Session on the Agenda

COMPLETE THE TRAVEL ACADEMY SURVEY FOR THIS CLASS

We appreciate your Feedback!



Hotel Wi-Fi is available throughout the complex → Password is GT2023

System for Award Management (SAM) Basics

Dallas Brewer and James (JD) Santini General Services Administration



SAM BASICS AGENDA

- I. WHAT IS SAM?
- II. WHO NEEDS TO REGISTER?
- III. HOW DO YOU REGISTER
- IV. HOW CAN YOU LOCATE OPPORTUNITIES
- V. OTHER FEATURES OF SAM
- VI. RECENT SAM UPDATES
- VII. HOW TO GET ASSISTANCE WITH SAM ISSUES







I. WHAT IS SAM









The Official U.S. Government System for:

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,

Exclusions, and Responsibility/

Qualification (was fapiis.gov) NEW

Entity Reporting

SCR and Bio-Preferred Reporting

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



I. WHAT IS SAM



SAM.gov is an official website of the U.S. Government. There is <u>no cost</u> to use SAM.gov. The site can be used to:

- Register to do business with the U.S. Government
- Update, renew, or check the status of an entity registration
- Search for entity registration and exclusion records
- One stop resource for multiple systems
 - Assistance listings (formerly CFDA.gov)
 - Wage Determinations (formerly WDOL.gov)
 - Contract Opportunities (formerly FBO.gov)
 - Contract Data Reports (formerly part of FPDS.gov)
- View and submit BioPreferred and Service Contract Reports
- Access publicly available award data via data extracts and system accounts

II. WHO NEEDS TO REGISTER



2023

- If a business wants to apply for federal awards as a prime awardee, they will need a **registration**.
- A registration allows a business:
 - To bid on government contracts; and
 - Apply for federal assistance
- As <u>PART</u> of registration, a <u>Unique Entity Identifier</u> (<u>UEI</u>) is assigned. Full registration requires <u>MORE</u> than just a UEI. Full Registration also has a <u>1-year</u> expiration date from the date of account activation.

Note: If a business does not want to apply directly for awards, then it does not need a registration. If only conducting certain types of transactions, such as reporting as a sub-awardee, only a **UEI** is needed.







← Sign In

Home

Search

Data Bank

Data Services

Help

Get Started with Registration and the Unique Entity ID

Submitting a registration and getting a Unique Entity ID are FREE.

Before You Get Started

Review these steps to choose which option is right for you. You can register to bid and apply for federal awards or you can request a Unique Entity ID only without having to complete a registration.

About Registration

Set up a SAM.gov

Account

Prepare Your Data

Get Started



If you want to apply for federal awards as a prime awardee, you need a registration.

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

To see comprehensive instructions and checklist for entity registration, download our Entity Registration Checklist [2].

If you do not want to apply directly for awards, then you do not need a registration. If you only conduct certain types of transactions, such as reporting as a subawardee, you may not need to complete a registration. You may only need a Unique Entity ID.

What does it mean to get only a Unique Entity ID and not register?

Entity Information Home

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 Entity Status

Already Registered?

You must renew your registration every 365 days to keep it active. You can make updates to your registration anytime or during renewal. If you're already registered, you already have a Unique Entity ID.

Go to your Entity Management Workspace to update or renew your



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SET UP A SAM.GOV ACCOUNT

- Set up a SAM.gov account to register and to get a UEI number in SAM.gov.
- The username and password are managed by Login.gov.
- Login.gov is a shared service used by Government agencies to access applications across participating websites with one user credential. Login.gov will authenticate when signing in to SAM.gov



SAM.gov only recognizes one email address on Login.gov accounts. Adding email addresses to your Login.gov account <u>may cause your SAM.gov login to</u> fail.

Sharing your Login.gov password or using someone else's Login.gov account violates the <u>rules of use</u>.

Email address		
Password		
Show password		

Sign in

First time using Login.gov?

Create an account



THE FOLLOWING SECTIONS MUST BE COMPLETED FOR "ALL AWARDS" REGISTRATIONS:

- A. UNIQUE ENTITY IDENTIFIER (UEI)
- B. CORE DATA
- C. ASSERTIONS
- D. Reps & Certs
- E. ARCHITECT AND ENGINEERING RESPONSES
- F. Defense federal acquisition supplement (dfars) questionnaire
- G. Points of Contact (POCs)
- H. SBA SUPPLEMENTAL PAGE (for small businesses only)





2023

A. Unique Entity Identifier

After selecting the purpose of the registration (All Awards) and the entity type, SAM requires the following information to obtain a UEI:

- LEGAL BUSINESS NAME Requires Company Name in the "REGISTERED NAME" field not just the "Doing Business As" Field
- PHYSICAL ADDRESS (A Post Office box may not be used as the physical address)
- Date of Incorporation
- STATE OF INCORPORATION (Entities outside the U.S. may need to provide alternate information)
- NATIONAL PROVIDER IDENTIFIER (NPI) (Non-U.S. entities only)

SAM.gov will validate the entity name and address. If SAM.gov cannot validate the entity, users can create a Help Ticket with the Federal Service Desk.

A selection must also be made if the entity information will be visible in public search results.



B. CORE DATA

CORE DATA INCLUDES THE FOLLOWING INFORMATION:

- BUSINESS INFORMATION (Inception Date, Address, TIN, URL, etc.)
- IRS Consent Form
- CAGE (COMMERCIAL & GOVERNMENT ENTITY) CODE: 5 character ID # assigned by the Defense Logistics Agency to identify vendors (If a firm does not have one, select "NO" and one is assigned after registration)
- OWNERSHIP DETAILS (owned or controlled by another entity)
- PREDECESSOR DETAILS (Predecessor hold federal contract/grant in the last 3 years?)
- GENERAL INFORMATION (Country/State of Incorporation, Entity/Profit Structure, etc.)
- FINANCIAL INFORMATION (Accept Credit Cards, EFT, Automated Clearing House)
- EXECUTIVE COMPENSATION QUESTIONS (80%+ revenue federal sources, access to finance info of senior exec.)
- PROCEEDINGS QUESTIONS (FAR 52.209-7, FAR 52.209-9)

C. ASSERTIONS

ASSERTIONS INCLUDES THE FOLLOWING INFORMATION:

- North American Industry Classification System (NAICS) codes (https://www.census.gov/naics/)
- Product Service Codes (PSC) (optional)
 (https://www.acquisition.gov/content/product-and-service-code-manual)
- Organizational Size (Annual Receipts, # of Employees)
- Electronic Data Interchange (EDI)
- Disaster Response Information



D. REPS & CERTS

REPS & CERTS (42 TOTAL QUESTIONS):

- Name/Title person responsible for prices offered in company's proposal
- Other Facilities used for performance on contract
- Following EPA guidelines
- Debarred, Suspended, Deemed Ineligible by any Federal Agency
- Convicted/Civil Judgment (Past 3 Years) fraud, antitrust, embezzlement, theft, forgery, bribery, etc.
- Delinquent Federal Taxes (Past 3 Years) +\$3,000, still unresolved
- Terminated for Cause (Past 3 Years)
- Small Business Concern
- EEOC Reports
- Affirmative Action Programs
- Labor Standards
- Greenhouse Gas Emissions Disclosure
- Section 889 Covered Telecommunications Equipment "DOES NOT"



E. ARCHITECT-ENGINEER RESPONSE

- Only applicable if one of the following NAICS Codes are selected:
 - 541310 Architectural Services
 - 541320 Landscape Architectural Services
 - 541330 Engineering Services
 - 541360 Geophysical Surveying and Mapping Services
 - 541370 Surveying and Mapping (except Geophysical)
 - 541410 Interior Design Services
 - 541620 Environmental Consulting Services
- If one of the above NAICS codes applies, additional information is required to complete SF 330 Part II.



F. DEFENSE FAR SUPPLEMENT (DFARS)

Is only applicable if an entity wishes to bid on or currently holds any Department of Defense (DoD) issued or DoD-funded contracts



G. Points of Contact

MANDATORY POINTS OF CONTACT:

- ACCOUNTS RECEIVABLE POC
- ELECTRONIC BUSINESS POC
- ELECTRONIC BUSINESS ALTERNATE POC
- GOVERNMENT BUSINESS POC
- GOVERNMENT BUSINESS ALTERNATE POC
- PAST PERFORMANCE POC
- Past Performance Alternate POC

H. SBA SUPPLEMENTAL PAGE

• Only applicable if at least one small business NAICS code is selected.

• Firms can provide additional information for market research and complete applications for SBA's HUB zone or 8(a) programs.

IV. HOW CAN YOU LOCATE OPPORTUNITIES



NOTICE TYPES FOR CONTRACT OPPORTUNITIES

Pre-Award Notices	Post Award Notices
Special Notice	Justification
Sources Sought	Sale of Surplus Property
Presolicitation	
Intent to Bundle Requirement	
Solicitation	
Combined Synopsis/Solicitation	
Award Notice	



SAM.GOV ACCOUNT IS REQUIRED FOR:

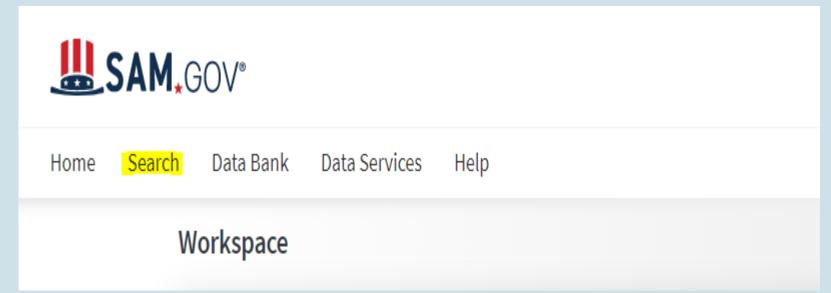
GOVERNMENT USERS	Non-Government Users
Post Notices	Follow Contract Opportunities
Update Notices	Saving Searches
	Interested Vendor List
	Requesting Secure Documents

NOTE: To only view opportunities, a SAM.gov account is not needed.



FOLLOWING CONTRACT OPPORTUNITIES

1) SELECT "SEARCH" TAB ON THE MENU AT THE TOP OF THE PAGE.

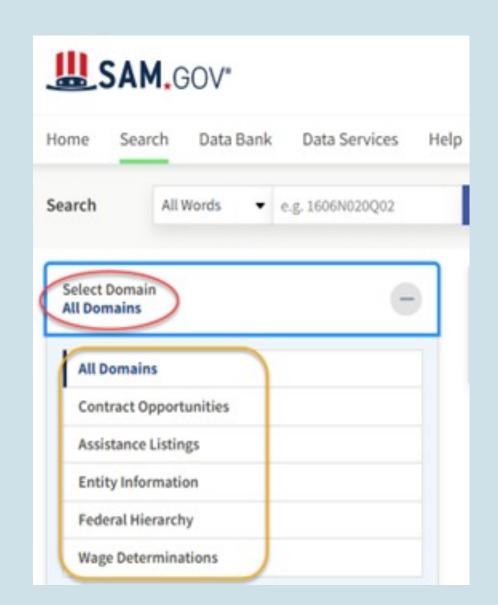




FOLLOW CONTRACT OPPORTUNITIES

- 2) Under "Select Domain":
 - Select "All Domains" from the dropdown menu
 - Choose the type of item to follow

Example: Select "Entity Information" and then select "Entities," to follow an entity registration.

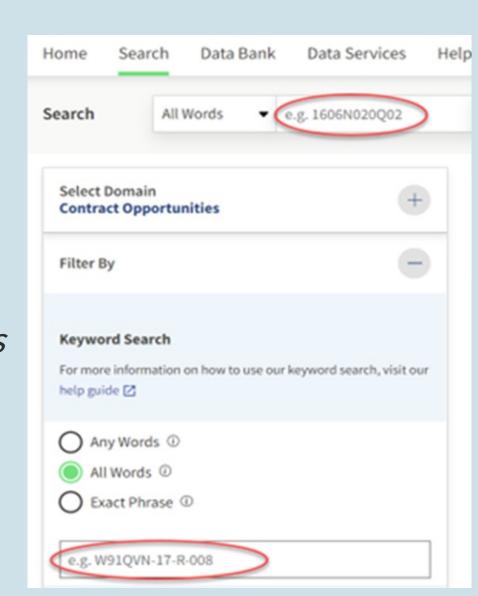




FOLLOW CONTRACT OPPORTUNITIES

3) Search for items of interest in the search bar

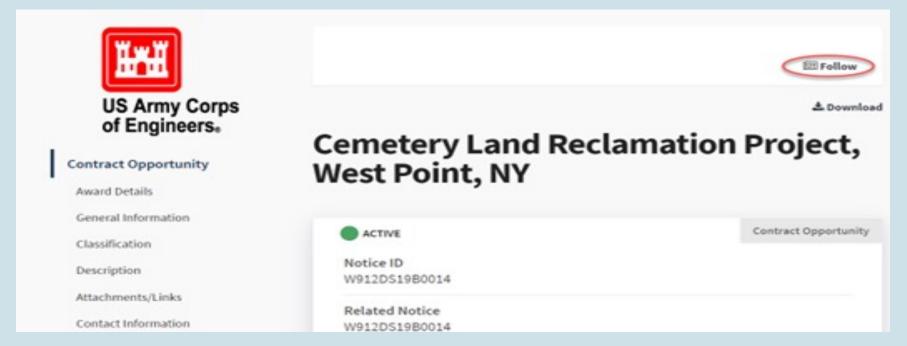
Example: To search for contract opportunities, enter an ID number or keyword; or enter an entity's UEI to follow that entity.





FOLLOW CONTRACT OPPORTUNITIES

- 4) From the search results, select the listing to follow.
- 5) On the listing details page, select the "Follow" link above the listing title.



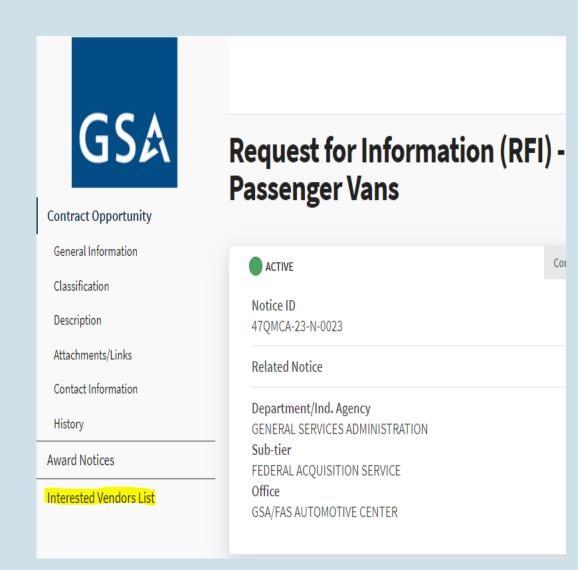
IV. HOW CAN YOU LOCATE OPPORTUNITIES



FOLLOW CONTRACT OPPORTUNITIES

The Interested Vendor List (IVL)

- List of vendors interested in competing for the opportunity or vendors interested in subcontracting opportunities.
- CO is the only person who can determine whether to include an IVL
- Vendors responding to an IVL must be logged into SAM.gov to respond







- Assistance Listings
- SAVED SEARCHES
- ENTITY SEARCHES
- EXCLUSIONS
- REPORTS & CONTRACT DATA
- WAGE DETERMINATIONS
- Managing & requesting roles
- DATA SERVICES





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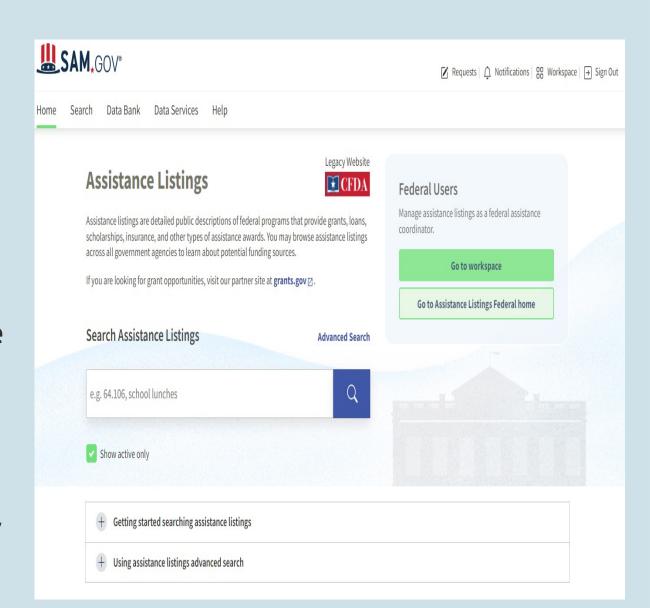
SCR and Bio-Preferred Reporting



2023

A. ASSISTANCE LISTINGS

- Projects, Services, and Activities
 - Education
 - Health Care
 - Research
 - Infrastructure
 - Economic Development
- Detailed Descriptions of Federal Assistance
- Entity looking for federal assistance:
 - Browse listings across all Government agencies
 - Unique Assistance Listing number
 - Link directly to grant opportunities on Grants.gov

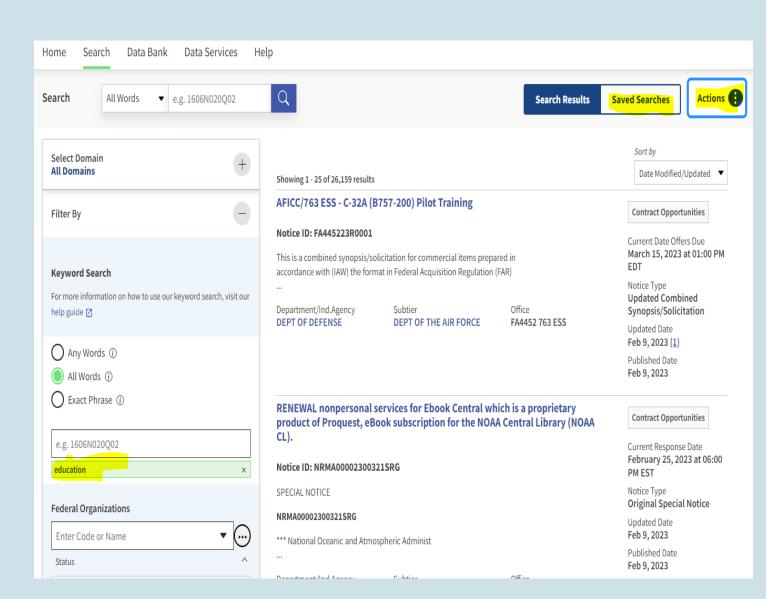




B. SAVED SEARCHES

- To save a search:
 - Be logged into Sam.gov account
 - Execute a search
 - Save search results in "Actions" menu.

- To view a list of saved searches:
 - Select the "Saved Searches" button above the search results







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C. ENTITY SEARCHES

- To view entities **NOT IN** public search display:
 - 1. Login to an account with role assigned to Entity Registration; or
 - 2. Login to an account with a Government email address
- To view entities **IN** public search display:
 - 1. Sign In to Sam.gov
 - 2. Select "Entity Information"
 - 3. Enter a search term (entity name or UEI)
 - Use filters on left side of page to narrow results



Search

Data Bank

Data Services

Help



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D. EXCLUSIONS

- Entities/Individuals <u>EXCLUDED</u> from receiving federal contracts
 - Debarred: banned from doing business for an indefinite period
 - Suspended: banned for a set time or until a requirement is met
- Active exclusions are those still in effect.
- Inactive exclusions:
 - Termination date already reached; reference purposes only.

Step 1: Access the SAM Excluded Party Database. SAM.GOV° Login-gov FAQs HOME SEARCH RECORDS DATA ACCESS CHECK STATUS Search Records Search Tips to Get Started: CAGE Code. Use Advanced Search to structure your search using multiple categories and criteria Are you a Pederal government employee? Create a SAM user account with your povernment e-mail address and log into SAM by aformation and registrants who chose to opt out of the public search. Conducting small business-focused research? In addition to what is contained in SAM, small businesses can provide the Small Businesses. (SBA) supplemental information about themselves. Use the SBA's Dynamic Small Business Search to conduct further market research Trying to find a contractor participating in the Disaster Response Registry? Use the Disaster Response Registry Search to locate contractors willing to provide debris removal, distribution of supplies, reconstruction, and other disaster or emergency relief services in the event of a national disaster Choose Quick Search or Advanced Search OUICK SEARCH: ADVANCED SEARCH: Use specific criteria in multiple categories to structure (Example of search term includes the entity's name, etc.) Enter DUNS number ONLY DISASTER RESPONSE REGISTRY SEARCH

Step 2: Input one of the following into the search criteria:

- 1. Name of individual or entity
- 2. DUNS number
- 3. CAGE code

	QUICK SEARCH: Enter your specific search term (Example of search term includes the entity's name, etc.)		ADVANCED SEARCH: Use specific criteria in multiple categories to structure you	
			search. ADVANCED SEARCH - ENTITY	
2	DUNS Number Search:	Enter DUNS number ONLY	ADVANCED SEARCH - EXCLUSION	
}	CAGE Code Search:	Enter CAGE code ONLY	DISASTER RESPONSE REGISTRY SEARCH	



E. REPORTS & CONTRACT DATA

CONTRACT DATA REPORTS

- Select Data Bank from the Header Menu.
- -"Show Reports For" & "Report Type"
- STANDARD REPORTS (37 Standard Reports Available)
 - Information about contract activity
 - Formatted to meet the needs of both government and public users.

AD HOC REPORTS

- Select individual fields from the database to run a query.
- Advanced feature recommended for users familiar with the data fields
- ADMINISTRATIVE REPORTS (8 Total Audit Procedures, Representations, Transfe Actions)
- STATIC REPORTS (4 Categories):
 - National Interest Action/Other Reports (Info Related to Recovery Act & Natural Disasters)
 - Small Business Goaling Reports (Small Business Data for Specified Date Range)
 - Top 100 Contractors Reports (Top 100 Contractors by Dollars Obligated Across Government
 - Federal Procurement Reports (FY 1981-2007 Geographical/Market Analysis)







2023

F. WAGE DETERMINATIONS (WDs)

- Set of wages, fringe benefits, and work rules that the Department of Labor has ruled as prevailing for a given labor category in a given locality.
- Can vary substantially depending on the location.
- Latest Davis-Bacon Act (DBA) and/or Service Contract Act (SCA) Wage Determinations







2023

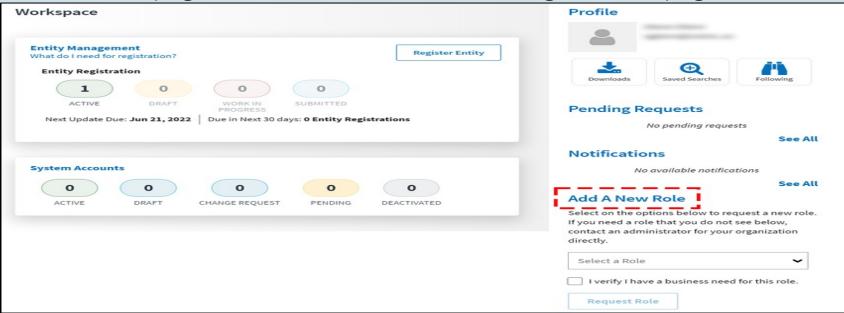
G. Managing & Requesting Roles

- Roles in SAM.gov are assigned by domain, or functional area.
 - Example: you may be assigned an Administrator role in assistance listings, but not in contract opportunities. Roles allow users to perform tasks only in the domain the role belongs to. You must submit separate role requests for each domain. You can only have one role per domain.
- Federal Organizations
 - Role applies within your department
 - You can perform the tasks that your role allows within the organization for which the role is assigned
 - Can have a role for more than one organization Example: you might have a Contract Opportunities Administrator role in two offices in the same sub-tier.
- Non-Federal Organizations
 - Roles apply within one or more entities
 Example: if you are an Entity Registration Administrator, you can modify entities you belong to, but not other entities.



G. Managing & Requesting Roles

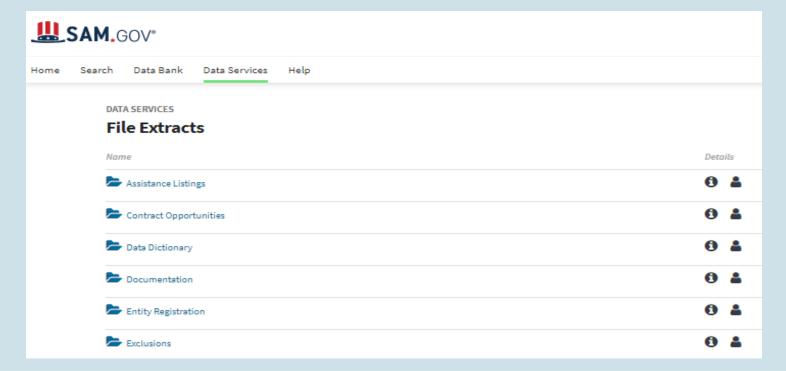
- Access an entity registration record
 - Granted a role with an entity in SAM.gov by an Entity Administrator.
 - Access the IVL and Attachments on Contract Opportunity Notices, you also need a role with your entity.
- To request a role with an entity, follow the instructions below:
 - 1. Sign in to Sam.gov and navigate to Workspace
 - 2. Scroll to bottom of page, select "Add A New Role" on right side of page





H. DATA SERVICES

- Data services are various methods to view, download, or pull public data from SAM.gov. They include File Extracts and Application Program Interfaces (APIs).
 - View and Download **Standardized Data Sets** from selected SAM.gov Domains
 - Access API Documentation for SAM.gov at open.gsa.gov/api.
 - Get an API Key for your Individual Account in your Profile allows limited number of data transactions daily
 - Request a System Account through your Workspace if need many API Calls Per Day (large amounts of data)

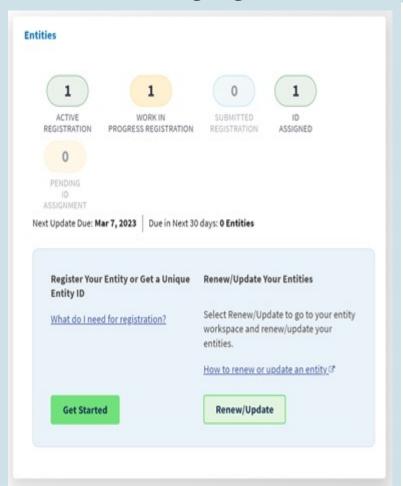


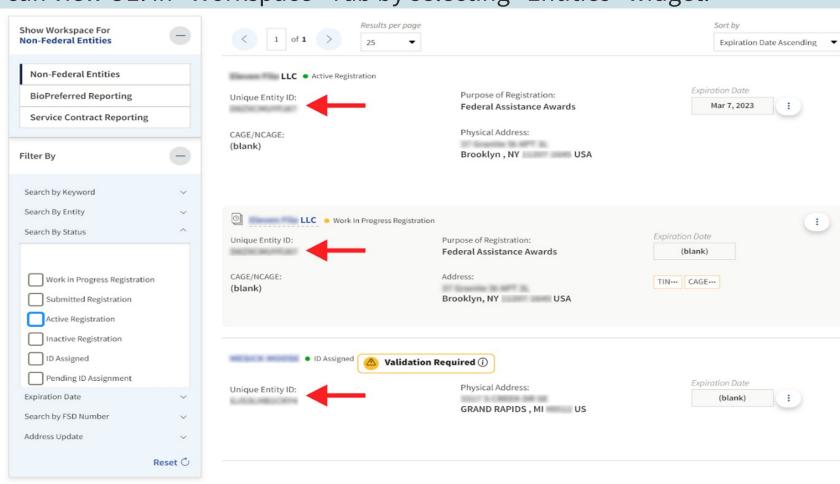
VI. RECENT SAM UPDATES



Transition from DUNS to UEI (April 4, 2022)

- The Unique Entity ID is a 12-character alphanumeric ID assigned to an entity by SAM.gov.
- DUNS Number has been removed from SAM.gov.
- Existing registered entities can view UEI in "Workspace" Tab by selecting "Entities" widget.



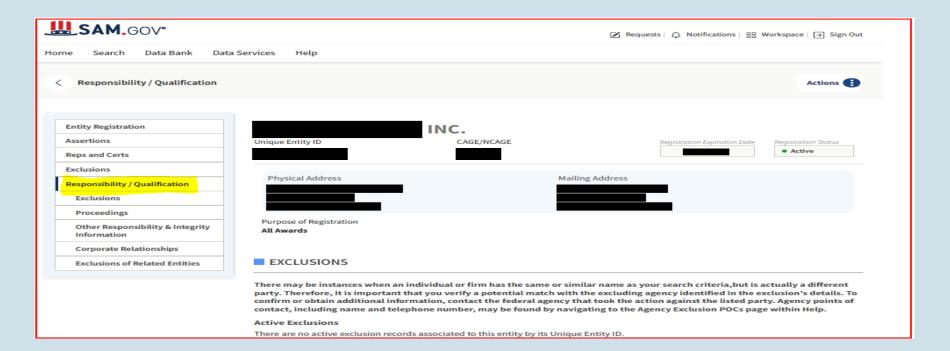


VI. RECENT SAM UPDATES



FAPIIS has moved to SAM.gov (December 12, 2022)

- Single access point for information about entity management, exclusions, responsibility and qualification information.
- Agencies will continue to submit responsibility and qualification data through the FAPIIS Module in CPARS.
- The FAPIIS data in SAM.gov is named Responsibility/Qualification
- Before awarding a contract, federal Contracting Officers review the responsibility/qualification information.



VII. HOW TO GET ASSISTANCE WITH **SAM ISSUES**







← Sign In

Home

Search

Data Bank

Data Services

Help

Use SAM.gov self help options



Q Search

Search help articles to find answers to your questions.



Explore a menu of our most popular help topics.

Ask the federal service desk



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
- ? Register your entity to get started with government contracts and assistance ☑
- FAQs for help with login ☑
- ☐ Supported Browsers ☑
- Most Searched Articles ☑

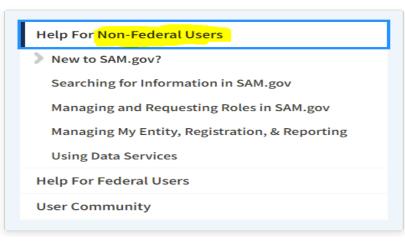
Find What's New in SAM.gov

- Niew Release Notes ☑
- ☐ View Blogs ☑
- ☐ View All IAE System Announcements ☑

VII. HOW TO GET ASSISTANCE WITH SAM ISSUES



Explore popular help topics

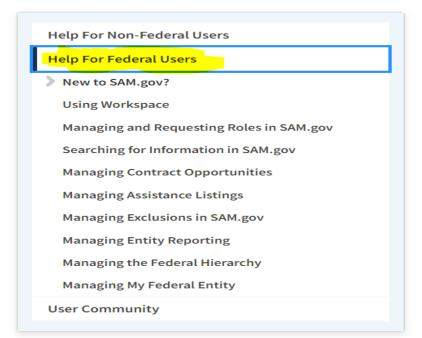


New to SAM.gov?

If you're new to SAM.gov, review this menu for information about how to start your account. Other topics on this help landing page provide details about things you can do in SAM.gov.

- ? Do I need an account to use SAM.gov? ☑
- ? What's the difference between signing up and registering?
- ? How to use login.gov with SAM.gov □
- ? What happens to my SAM.gov access if I change my email address on login.gov? □

Explore popular help topics



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 □



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- Find this Travel Academy Session on the Agenda

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We appreciate your Feedback!



Hotel Wi-Fi is available throughout the complex → Password is GT2023