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System for Award Management (SAM)

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OVERVIEW



- What about SAM.gov?
- New Account – Login.gov
- Vendor Registration
- Unique Entity Identification (UEI)
- SAM Registration Process
- CAGE Validation Overview



What about SAM.gov?

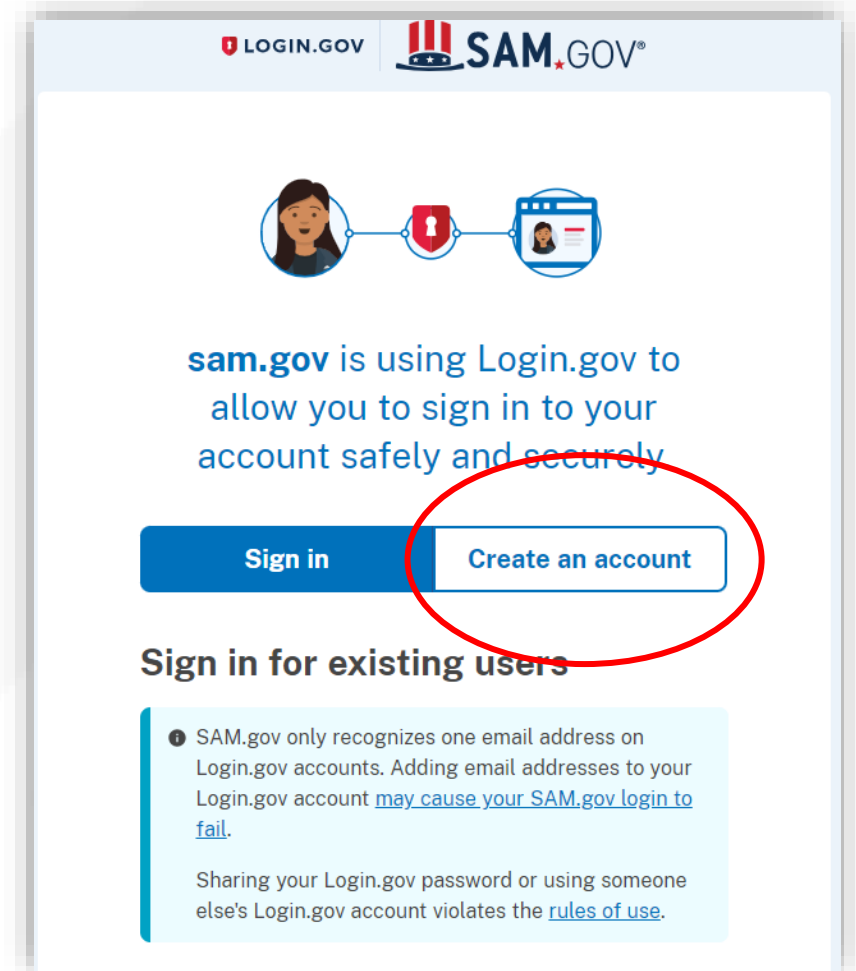


- SAM.gov is an official website of the United States government. SAM.gov is **FREE** to use. There is no charge to get a Unique Entity ID, register your entity or maintain your registration
- The unique entity identifier used in SAM.gov has changed – April 4, 2022, the unique entity identifier used across the federal government changed from the DUNS Number to the Unique Entity ID (generated by SAM.gov)
- Only one CAGE Code may be assigned per company per physical address
 - Corporations, Incorporations, LLC, etc.
 - Sole proprietors
 - Schools
 - Federal and DoD agencies
 - Local state and government

Create an Account – Login.gov



- Valid email address & access to your email
- Must validate email
- Password – **Must be GREEN**
 - Password generator
 - At least 16 characters long
 - Phrases
 - Save your password
- Authentication Method (one-time code)
 - Recommend – Text/Call
- Updates to email or authentication – login.gov





Prepare for Entity Registration

- **All Awards** registration allows you to bid on contracts and other procurements, as well as apply for financial assistance.
- **Financial Assistance Awards Only** registration allows you to apply for financial assistance, or grants and loans, only.

For All Awards registrations, prepare these sections:	For Financial Assistance Awards Only registrations, prepare these sections:
<ul style="list-style-type: none">• Unique Entity ID• Core Data• Assertions• Reps & Certs• Architect and Engineering Responses• Defense FAR Supplement (DFARS) questionnaire (if applicable)• Points of Contact (POCs)• SBA supplemental page (If you are a small business)	<ul style="list-style-type: none">• Unique Entity ID• Core Data• Reps & Certs• Points of Contact (POCs)

Vendor Registration



- Legal Business Name
 - Physical Address (*A post office box may not be used as your physical address*)
 - Date of Incorporation
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- ✓ Your entity name and address will be validated by SAM.gov. If SAM.gov cannot validate your entity, you will be prompt to create a help ticket with the Federal Service Desk to provide documentation of your legal business name and physical address with date of incorporation.
 - ✓ Once validated, you receive your 12 character Unique Entity ID, you can continue to registration.

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](#)

Entity Validation Documentation Requirements



Entity Validation Documentation Requirements



Instructions:

- For proof of name and/or address, choose document(s) from **List A**. At least one document must have both your full, correct legal business name and current, correct physical address.
- For proof of your entity start year and state, choose document(s) from **List B**.
- For proof of your national identifier (international entities only), choose a document(s) from **List C**.

List A - Name and/or Address	List B - Start Year and State of Incorporation	List C - National Identifier (international only)
<p>Most Commonly Used Documents:</p> <ul style="list-style-type: none"> • Articles of Incorporation/Organization/Formation (if stamped as filed with an authority) • Bank Statements* (redact information that isn't necessary for validation) • Certificate of Formation/Organization (if stamped as filed with an authority) • Department of Treasury IRS letter assigning your EIN • Secretary of State Certificate of Filing • Screenshot/PDF file of your business profile* in your state's online business registry or Secretary of State website (must be current registration and must include the registry URL) • Utility Bill* (water, gas, or electric only) <p>Other Documents You Can Use:</p> <ul style="list-style-type: none"> • Bylaws for your company (if stamped as filed with an authority) • Certificate of Good Standing* issued by your state to your business that contains date of incorporation, organization, or establishment • City Business Tax Certificate* • Department of Treasury IRS Tax Exemption Status Letter* • "Doing-business-as" or DBA document (if stamped as filed with an authority) • Driver's License (for sole proprietors or individuals doing-business-as only; must be non-expired and have your exact name) • IRS Form 8822-B or Form 990 for address change (filed only) • IRS forms marked as received by the IRS or processed by a CPA or e-filing software (e.g., Form 1040 with schedule C for sole proprietors) • IRS Form 1099* if you are the recipient (not the filer) • License to Operate* (issued by city, state) • Limited Liability Company Articles/Articles of Amendment (if stamped as filed with an authority) • Partnership documentation (if stamped as filed with an authority) • Passport (may only be used by sole proprietors or individuals doing-business-as where the physical business address is on the passport; must be non-expired and have your exact name and address. Passports without addresses or with addresses that are different than your physical business address cannot be used) • Share Certificate • State Sales and Use Tax Permit* • Tax invoice* (federal, state, local, international) • Town charter, documentation from state governments for town's formation; Governor's declarations; formal resolution from town council establishing office. 	<p>Most Commonly Used Documents:</p> <ul style="list-style-type: none"> • Articles of Incorporation/Organization/Formation (if stamped as filed with an authority) • Certificate of Formation/Organization (if stamped as filed with an authority) • Department of Treasury IRS letter assigning your EIN • Secretary of State Certificate of Filing • Screenshot/PDF file of your business profile* in your state's online business registry or Secretary of State website (must be current registration and must include the website URL) <p>Other Documents You Can Use:</p> <ul style="list-style-type: none"> • Bylaws for your company (if stamped as filed with an authority) • Certificate of Good Standing* issued by your state to your business that contains date of incorporation, organization, or establishment • "Doing-business-as" or DBA document (if stamped as filed with an authority) • IRS forms marked as received by the IRS or processed by a CPA or e-filing software (e.g., Form 1040 with schedule C for sole proprietors, only if it contains your business start date) • Limited Liability Company Articles/Articles of Amendment (if stamped as filed with an authority) • Partnership documentation (if stamped as filed with an authority) • Town charter, documentation from state governments for town existence; Governor's declarations; formal resolution from town council establishing office, if it contains the date your entity began 	<ul style="list-style-type: none"> • Screenshot/PDF file of your business profile* in your country's official online business registry (must be current registration and must include the registry URL). <i>Do not submit screens from U.S. federal websites.</i> • Government-issued proof of tax identification number, employer identification number, or other identifier issued by your government. • Government-issued tax receipt/return • Passport (for sole proprietors or individuals doing-business-as only; must be non-expired and have your exact name and address) <p>All international documents must have a satisfactory English language translation attached.</p>

Your documents must show your entity information **exactly** as you entered it in the Enter Entity Information screen on SAM.gov. Documents in List A and List B with an asterisk (*) **must** be 5 years old or less.

SAM Registration Prep



- Business Information
 - Organization start date
- Taxpayer Identification Number (TIN)
 - Tax Payer Name
 - Address used for tax documents
- Business Bank Account
 - Routing number
 - Account number
 - Bank phone number
- North American Classification Industry System (NAICS) / Product & Services Code
 - <https://www.census.gov/naics/>
- Point of Contacts (POC)
 - Account
 - Electronic
 - Government
- Have phone & email present– security codes and One Time Passwords (OTP)

SAM Registration Overview



- **Core Data**
 - Business Information
 - IRS Consent – Requires OTP to continue
 - Ownership Details
 - General Information
 - Financial Information
- **Assertions**
 - Good and Services
 - Size Metrics
 - Electronic Data Interchange (EDI)
 - Disaster Reponses Information
- **Representations and Certifications**
 - FAR Responses
- **Points of Contact (POCs)**
- Submission – Requires an OTP



[Entity Registration Checklist](#)

SAM Registration Submission



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 step can take two business days. You will get an email from SAM.gov when that review is Successful.
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 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 a dla.mil address. Please tell your Government Business POC to respond right away to any requests from a 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. Until then, use the Check Registration Status link at SAM.gov to see where your registration is in the review process.

CAGE Validation Overview



- **Validation Elements:**

- Legal Business Name
 - Physical Address
 - Acquisitions / Name Changes*
 - *Requires additional documentation
- See [Commercial and Government Entity Program](#)

- **Manual Validations:**

- ALL NEW registrations
- ALL UPDATES with changes to LBN/Physical Address/Name Change

- **Automated Validations:**

- All updates that do not include changes to LBN/Physical Address

- When information provided by SAM is insufficient to process a registration, emails are sent to **Government Business** POC(s) requesting additional documentation and information called **RESPONSE REQUIRED**.

If registration data or documents are found to be invalid, errors or incomplete or vendors fail to respond, a CAGE registration will not be processed. Sent back to Work in Progress.

Common Issues



- **Entity Validation failing**
 - Non physical address
 - No official legal documentation
 - Legal documentation not matching
 - DBA not included
- **SAM Registration**
 - Not being prepared
 - IRS failed validation – information not matching
 - FAR Questionnaire
- **CAGE Validation**
 - Not responding to RESPONSE REQUIRED
 - Not providing documents to validate Legal Business name or the physical address
- **Renewals**
 - Company changes such as; Legal Business Name, New Address, IRS Address update

How APEX assist in SAM.gov



SAM is not an APEX site or portal

- We cannot reset your password
- We can only view your profile from the Public Search, non sensitive information
- We can assist you with your SAM registration/renewal
- We can assist you with the correct documents for your entity's name & address
- We can assist you if your IRS and/or CAGE does not validate in SAM
- Federal Service Desk (FSD.gov)

Q & A