

System for Award Management (SAM)

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Creating Efficiencies through Integration
and Consolidation

March 25, 2014



US Army Corps of Engineers
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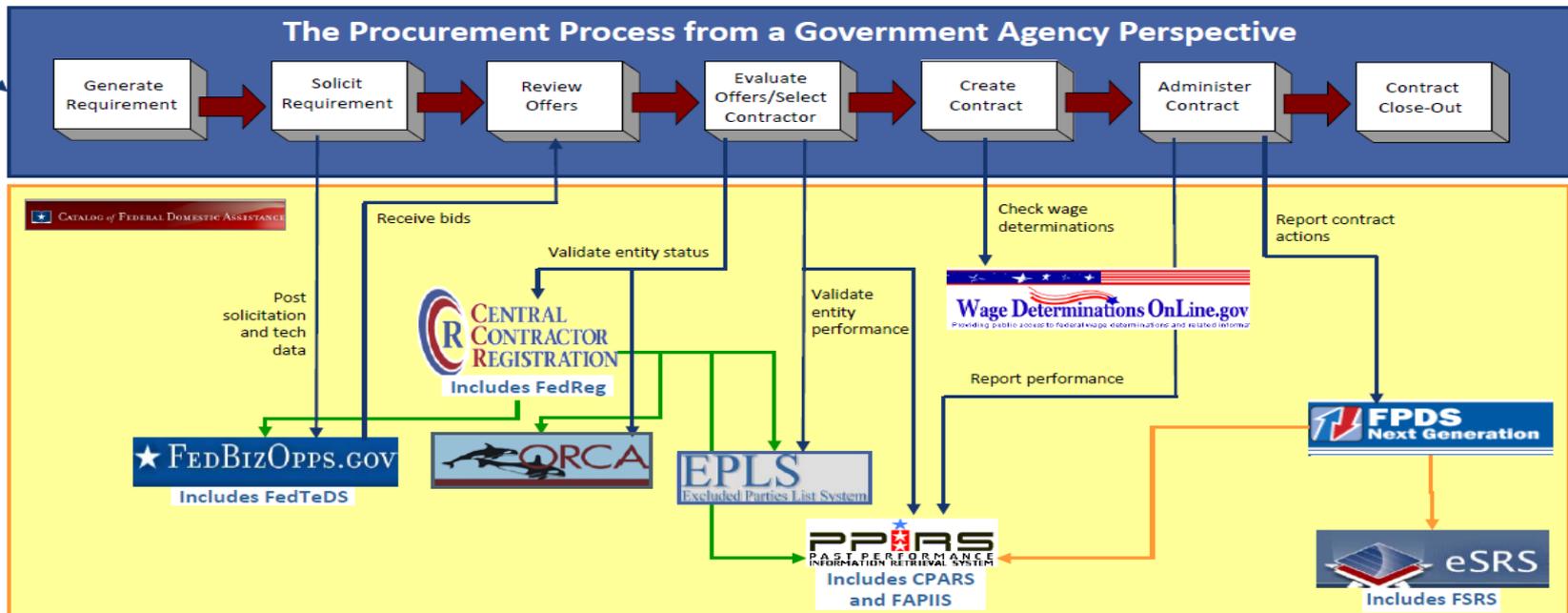
The Award Process of the Past



The Award Process of the Past



► Separate, siloed systems supported the award process



The Future: An Improved Approach

- Single Login – Functionality accessible at one online location to streamline the process
- One Data Source – Centralized, normalized data to eliminate potential for conflicting values and improve agility to deal with future changes
- One Host – Consolidated hosting, reducing operations and maintenance costs



How is SAM Organized?

Functional Area	Capabilities	Legacy Systems
Entity Management	<ul style="list-style-type: none"> Manage entity core data Manage certifications/representations 	<ul style="list-style-type: none"> ORCA – Online Representations and Certifications Application CCR – Central Contractor Registration
Award Management	<ul style="list-style-type: none"> Post solicitation and award data Maintain government-wide contract award data Manage government-wide subcontractor data 	<ul style="list-style-type: none"> FBO – Federal Business Opportunities FPDS-NG – Federal Procurement Data System-Next Generation eSRS/FSRS – Electronic Subcontracting Reporting System/FFATA Subaward Reporting System
Wage Data	<ul style="list-style-type: none"> Access wage determinations 	<ul style="list-style-type: none"> WDOL – Wage Determinations Online
Performance Information	<ul style="list-style-type: none"> Manage/maintain past performance information Manage exclusion list 	<ul style="list-style-type: none"> PPIRS– Past Performance Information Retrieval System CPARS - Contractor Performance Assessment Reporting System FAPIIS - Federal Awardee Performance and Integrity Information System EPLS – Excluded Parties List System
Assistance Program Catalog	<ul style="list-style-type: none"> Create/maintain assistance program catalog 	<ul style="list-style-type: none"> CFDA – Catalog of Federal Domestic Assistance
Support	<ul style="list-style-type: none"> Provide security/access control Provide reporting/communications support Provide internal controls 	

What Systems Are in SAM?

- **Award Management: Federal Procurement Data System (FPDS), FedBizOpps.gov, Electronic Subcontracting Reporting System (eSRS)**
- **Assistance Program Catalog**
- **Entity Management: Online Representations and Certifications Application (ORCA)**
- **Wage Data: Wage Determination Online**
- **Performance Information: Excluded Parties List System (EPLS), Past Performance Information Retrieval System (PPIRS)**



There is no fee to use or register in SAM. You can find the SAM web site at <https://sam.gov>.



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SAM Phase 1 includes

- **Entity Management**
 - ▶ ORCA
 - ▶ CCR
- **Exclusions portion of Performance Information**
 - ▶ EPLS
 - ▶ PPIRS



What Are Phase 1 Benefits?

- **Contracting/Grants Officers**
 - ▶ **Streamlined Process – One login provides access to entity core data, representations and certifications, and exclusions information**
- **Entities (anyone who wants to do business with the government)**
 - ▶ **Streamlined Process – One login allows entities to create or update their registration as well as their representations and certifications**
 - ▶ **Update Date Alignment – Capabilities in one location aligns CCR and ORCA registration updates**
 - ▶ **Registration Purpose – A question at the start of the process allows grantees to avoid contractor-specific content**



SAM Phase 1 went live on July 29, 2012

- ▶ **If you had a registration in CCR (and ORCA), your information moved to SAM**



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Are you getting notices?

- **If your Primary and Secondary POCs are no longer with your organization, you'll need to contact the Help Desk to have their permissions assigned to your user account**
- **The Primary/Secondary users of your registration are notified at 60, 30, and 15 days prior to the registration expiration**



System for Award Management - Windows Internet Explorer
https://www.sam.gov/portal/public/SAM/#1

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HOME SEARCH RECORDS DATA ACCESS GENERAL INFO HELP

SAM
SYSTEM FOR AWARD MANAGEMENT

USER NAME PASSWORD **LOG IN**
[Forgot Username?](#) [Forgot Password?](#) [Create an Account](#)

CREATE USER ACCOUNT
Your CCR username will not work in SAM. You will need a new SAM User Account to register or update your entity records. You will also need to create a SAM User Account if you are a government official and need to create Exclusions or search for FOUO information.
[Create User Account](#)

REGISTER/UPDATE ENTITY
You can register your Entity (business, individual, or government agency) to do business with the Federal Government. If you are interested in registering or updating your Entity, you must first create a user account.
[Register/Update Entity](#)
Submitted a SAM registration? [Check Status](#)

SEARCH RECORDS
All entity records from CCR/FedReg and ORCA and exclusion records from EPLS, active or expired, were moved to SAM. You can search these records and new ones created in SAM. If you are a government user logged in with your SAM user account, you will automatically have access to FOUO information.
[Search Records](#)

WHAT IS SAM? [Need Help?](#)
The **System for Award Management (SAM)** is the Official U.S. Government system that consolidated the capabilities of CCR/FedReg, ORCA, and EPLS. There is NO fee to register for this site. Entities may register at no cost directly from this page. User guides and webinars are available under the Help tab.

[NEWS AND ANNOUNCEMENTS](#) [USER GUIDES/HELPFUL HINTS](#) [FORMER CCR REGISTRANTS](#)



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Federal Service Desk - Home - Windows Internet Explorer
https://fsd.gov/fsd-gov/home.do

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Federal Service Desk - Home

me Top Help Topics Learning and Support Feedback My Account

fsd.gov

Federal Service Desk

Start here for help on U.S. Government contracts and grants systems

Search

Federal Service Desk Contact FSD News and Announcements

Purpose The purpose of the Federal Service Desk (FSD.gov) is to help visitors get the information and assistance they need for the systems (websites) that the FSD supports.	Hours of Operation Monday - Friday 8 a.m. to 8 p.m. ET U.S. Calls: 866-606-8220 International Calls: 334-206-7828 DSN: 866-606-8220	Need Help with Registration Status in Sam? What's My Registration Status in SAM? Click here for help.
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Log into SAM

How to Check Your Registration Status

Logging in and Searching

Viewing Status Details

Status Details Examples

The Validation Process

Stage 1: New Registration

Stage 2: Draft

Stage 3: Work in Progress

Stage 4: Submitted

Stage 5: Active

Inactive / Expired

What's My Registration Status in SAM?

Your registration in SAM is known as an **Entity Management Record**. Before you're able to do business with the Federal Government, your record must go through a number of registration and validation steps before it can become active. Use the links on the left to view instructions for checking the status of your entity record in SAM.

1. Start by logging into your account on the SAM homepage. Once logged in, click on the **Register / Update Entity** link from the "My SAM" Menu on the left. From that menu, you'll have the ability to search Complete, Incomplete, or Inactive Registrations. Check the table to the right to know which type of registration you need to search, and then click on the option.

MY SAM

Manage My User Roles

Manage Entity Users

Register/Update Entity

Complete Registrations

Incomplete Registrations

Inactive Registrations

Registration Categories

Complete Registrations	Registrations are complete if all required information has been entered, and the entity has been submitted for validation. This is also where you can search for active registrations.
Incomplete Registrations	Registrations are considered incomplete if all of the necessary information has not yet been entered, or if the entity has failed CAGE/NCAGE or IRS validation.
Inactive Registrations	Registered entities become inactive after they have not been updated at least once in the past

Done

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Public Search - Yes or No?

- **Unless you have opted out of the public search, you'll be able to see your registration expiration date by going to <https://sam.gov> and searching by your DUNS, CAGE Code, or Business Name**





USER NAME PASSWORD [LOG IN](#)
[Forgot Username?](#) [Forgot Password?](#)

[Create an Account](#)

HOME SEARCH RECORDS DATA ACCESS GENERAL INFO HELP

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USER NAME PASSWORD [Forgot Username?](#) [Forgot Password?](#)

[Create an Account](#)

- HOME
- SEARCH RECORDS
- DATA ACCESS
- GENERAL INFO
- HELP

Search Records

You can enter a DUNS number, CAGE code or Business Name to search for the entities that you are interested in reviewing. The top search bar allows you to enter any search term. You can also enter exclusion search terms to search for exclusion records. If you want to search for only a CAGE code or a DUNS number you can use the bottom two search bars. Once a search has returned results, use the filters provided to narrow results.

Government employees must create a SAM user account with their government email address. Log in before searching in order to see FOUO information and those registrants who selected to opt out of the public search.

You can only use one search bar at a time

(Example of search term includes the entity's name, etc.)



DUNS Number Search:

CAGE Code Search:



Click on View Details to see more info
If you don't see your registration, click on Inactive and Apply Filters

System for Award Management - Windows Internet Explorer
https://www.sam.gov/portal/public/SAM/?portal:componentId=8db50911-8037-43be-8794-745d38f6

TOTAL RECORDS: 17
Result Page: 1 2 NEXT
Sort by Modified Date Order by Ascending

FILTER RESULTS
Your search for "The* Best**" returned the following results...

By Record Status
 Active
 Inactive

By Functional Area
 Entity Management
 Performance Information

Note: Filters are case sensitive

Entity	Status	DUNS	CAGE Code	Has Active Exclusion?	DoDAAC	Expiration Date	Delinquent Federal Debt?	Action
Best Western Kendall Hotel & Suites, The	Active	809032837	4ZRC4	No		03/14/2015	No	View Details
HOTEL TWO, LLC	In Progress	079293644		No			No	View Details
SIMPLY THE BEST HOME CARE	Active	009532394	5DJD1	No		02/11/2015	No	View Details
BEST CONNECTION, INC., THE	Active	021196019	1PE35	No		01/27/2015	No	View Details

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Please note:

- **If you have opted out of the public search, Federal Government staff members who search for your registration when logged into their government SAM account will be able to see your registration**
- **But...**



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I Need To Update Now – What Do I Do?

- If you need to update your SAM registration (e.g., you changed banks and are no longer getting paid), you may do so at <https://sam.gov>
 - ▶ You must first create an individual user account in SAM by clicking on “Create User Account” and filling in the basic information
- In SAM, the entity administrator holds the rights to update a registration.
- You must review each page in the registration to successfully submit the registration



If you opted out of the public search, you will need to go to your Complete Registrations to view your registration in SAM Create an Individual User Account at sam.gov

System for Award Management - Windows Internet Explorer
https://www.sam.gov/portal/public/SAM/?portal:componentId=7d526634-bb8c-40f9-a579-7061ad34

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Helpful Hints for Submitting a Registration

- **Creating a SAM user account does not mean that your entity is registered in SAM**
- **If you have an Active or Expired record, you may also have a record at one of the other status levels, if you initiated an update/renewal**



▶ If you do have a registration in SAM, it may be at one of the following status levels:

- ▶ Active – You have an active registration**
- ▶ Expired – You have a registration that was once active, but is now expired**
- ▶ Draft – You started, but have not completed, the Core Data section**
- ▶ Work in Progress – You have completed the Core Data section but either need to provide additional information or need to click “Submit”**
- ▶ Submitted – You have submitted the registration, but it is not yet active because it is waiting for TIN validation and/or CAGE validation, which typically takes 3 to 5 business days.**



Getting Your Registration to “Active”

- If your registration is in “Draft” or “Work In Progress” status, it has not yet been submitted
 - ▶ Access it by logging in and clicking on “Register/Update Entity” and then “Incomplete Registrations”
 - ▶ You must review the registration in its entirety (each page) before you can successfully submit the registration
- Upon submission, the Annual Renewal Date for the entity registration will be set; entity registrations must be renewed every 365 days
- An entity registration will not be considered active until the IRS has successfully validated the TIN match and the CAGE Code has been assigned or validated. This process happens outside SAM and typically takes 3 to 5 business days.
- If the size metrics you enter in the Assertions section meets the criteria for a small business designation, a link to SBA’s Supplemental page will become available after you complete the Points of Contact section

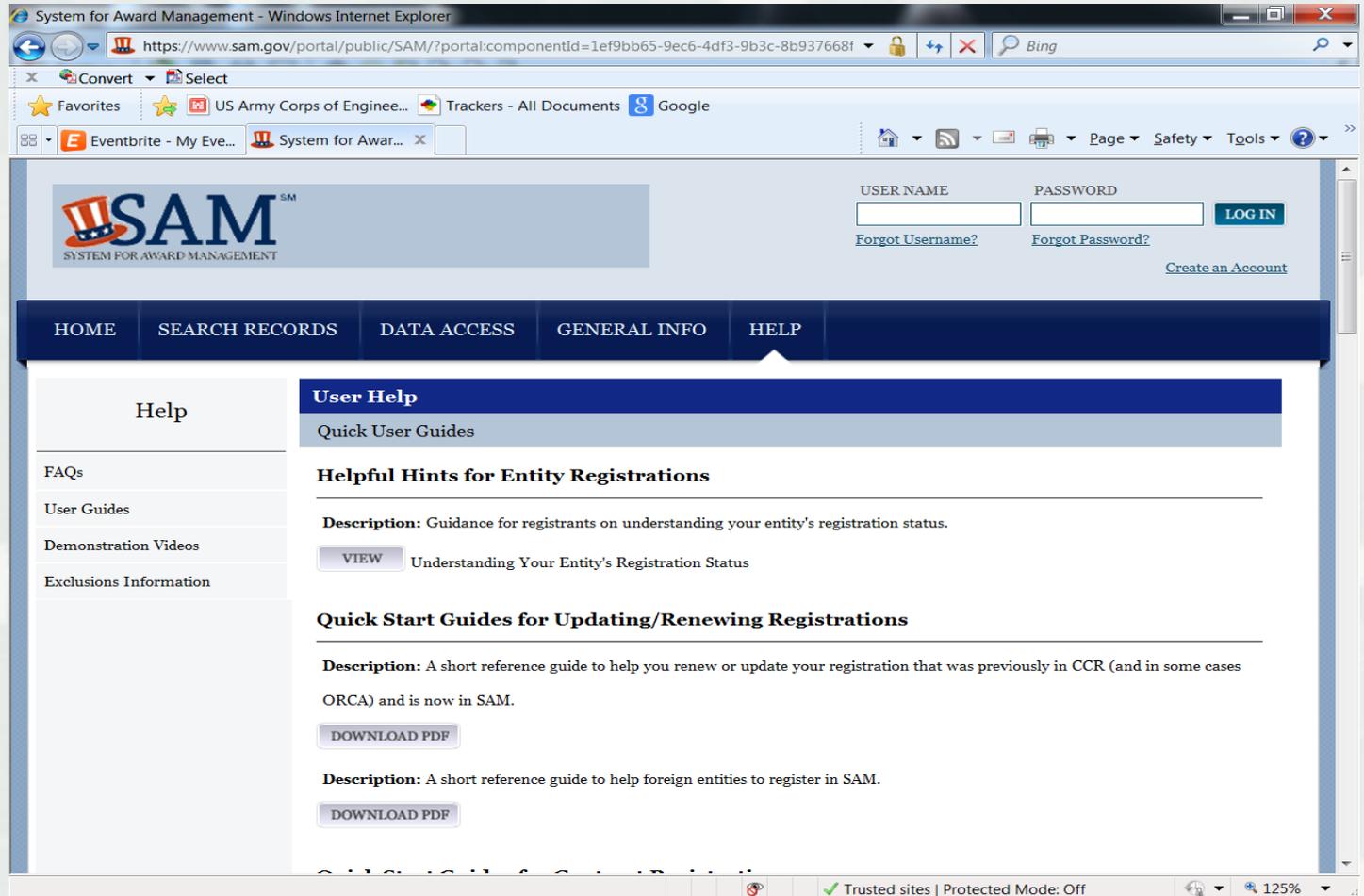


What Help Is Available?

- **Start with the Help tab on the SAM web site at <https://sam.gov>**
 - ▶ **FAQs provide answers to frequently asked questions**
 - ▶ **The User Guide provides a comprehensive step-by-step guide to using all parts of SAM**
 - ▶ **Quick Start Guides introduce you to key functionality you may need, including Account Migration and Renewing/Updating a registration**
 - ▶ **Web demonstration videos walk you through common tasks**
 - ▶ **Helpful Hints provide guidance for searching in SAM**



When you get ready to create or update/renew your registration, please use Quick Start Guide for Updating/ Renewing Registrations on the Help tab of <https://sam.gov>



The screenshot shows a Windows Internet Explorer browser window displaying the SAM.gov website. The address bar shows the URL <https://www.sam.gov/portal/public/SAM/?portal:componentId=1ef9bb65-9ec6-4df3-9b3c-8b937668f1>. The page features the SAM logo (System for Award Management) and a navigation menu with tabs for HOME, SEARCH RECORDS, DATA ACCESS, GENERAL INFO, and HELP. The HELP tab is selected, and the "User Help" section is expanded. A red arrow points to the "Quick Start Guides for Updating/Renewing Registrations" link in the left sidebar. The main content area displays the "Quick Start Guides for Updating/Renewing Registrations" section, which includes a description: "A short reference guide to help you renew or update your registration that was previously in CCR (and in some cases ORCA) and is now in SAM." and a "DOWNLOAD PDF" button.



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Help!

- Procurement Technical Assistance Centers - PTAC
- www.aptac-us.org/



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Procurement Technical Assistance Center

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The Procurement Technical Assistance Center's (PTAC) mission is to maximize the number of capable U.S. companies participating in the government marketplace.

Find A Center

The Washington Procurement Technical Assistance Center program helps companies find and successfully achieve contracts for work with the local, state and federal governments. Click on your county in the map below find the center nearest you.

Events & Training

Government Contracting 101 - Kent Highline Community College will be offering Government Contracting 101 and PTAC Orientation in Room 132 at Highline's Outreach Center. More information [View the full calendar](#)

FAQ

Do you have questions about the program? Check out our frequently asked questions. [More information](#)

[PTAC LOCATIONS](#)

