SAM
SYSTEM FOR AWARD MANAGEMENT

Quick Start Guide for Entities Interested in Being Eligible for Government Contracts

How to register your entity to be eligible for CONTRACTS in SAM:

Before you register, you need to know the following:

What is an Entity?

In SAM, your company/business/organization is now referred to as an "Entity."

- **REGISTERING IN SAM IS FREE.**
- If you were registered in CCR, your company's information is already in SAM. You just need to set up a SAM account. See the "Migrating Roles" Quick Start Guide.

Your Entity's DUNS Number

You need a DUNS to register your entity in SAM.

- If you do not have a DUNS number, you can request a DUNS number for free by visiting D&B at http://fedgov.dnb.com/webform
- It takes 1-2 business days to obtain a DUNS.

Your Entity's Taxpayer Identification Number (TIN)

You need your entity's Tax ID Number (TIN) and taxpayer name (as it appears on your last tax return). Foreign entities that do not pay employees within the U.S. do not need to provide a TIN.

- A TIN is an Employer Identification Number (EIN) assigned by the Internal Revenue Service (IRS).
- Sole proprietors may use their Social Security Number (SSN) assigned by the Social Security Administration (SSA) if they do not have a TIN, but please be advised it will not be treated as privacy act data in SAM.
- To obtain an EIN visit: www.irs.gov/businesses/small/article/0,,id=102767,00.html
- Activating a new EIN with the IRS takes 2-5 weeks.

Steps For Registering Your Entity in SAM

1. Go to www.sam.gov
2. Create a Personal Account and Login
3. Click "Register New Entity" under "Manage Entity" on your "My SAM" page
4. Select your type of Entity
5. Select "Yes" to "Do you wish to bid on contracts?"
6. Complete "Core Data"
   - ✓ Validate your DUNS information
   - ✓ Enter Business Information (TIN, etc.)
   - ✓ Enter CAGE code if you have one. If not, one will be assigned to you after your registration is completed. Foreign registrants must enter NCAGE code.
   - ✓ Enter General Information (business types, organization structure, etc)
   - ✓ Financial Information (Electronic Funds Transfer (EFT)Information)
   - ✓ Executive Compensation
   - ✓ Proceedings Details
7. Complete "Assertions"
   - ✓ Goods and Services (NAICS, PSC, etc.)
   - ✓ Size Metrics
   - ✓ EDI Information
   - ✓ Disaster Relief Information
8. Complete "Representations and Certifications"
   - ✓ FAR Responses
   - ✓ Architect-Engineer Responses
   - ✓ DFARS Responses
9. Complete "Points of Contact"
10. Your entity registration will become active after 3-5 days when the IRS validates your TIN information.

How do I get more information? Take a look at the SAM User Guide.

Go to Our Website: www.sam.gov

Contact the SAM Help Desk: www.fsd.gov

Quick Start Guide for Migrating Roles

You can migrate your legacy system roles to SAM

What is an Entity?

In SAM, your company/business/organization is now referred to as an "Entity."

- All of your entity's data in the legacy systems (CCR, ORCA, EPLS, FedReg) will be migrated to SAM. You can migrate your individual roles upon logging into your SAM account.

Your Roles Will Migrate to SAM

You will have the same access to your data in SAM that you had in the legacy systems.

- You will need to create a new username and password.
- This new SAM username and password will work for **all** of your migrated roles.

Migrating Roles from Phase One Systems

You can migrate roles from CCR, EPLS and FedReg but not ORCA.

- The Reps and Certs data for your entity will be migrated to SAM.
- SAM has combined the CCR and ORCA functionality. When you migrate your CCR account, you will be given access to your organization's Reps & Certs.
- If you have multiple accounts in one legacy system, you may find that you won't need all those accounts to do the same business in SAM. You can migrate the roles connected to those accounts into your single SAM user account.

Access to Your Legacy Email Accounts

To migrate your legacy account (CCR, FedReg, or EPLS), you need the email address used for your legacy account.

- SAM uses your legacy email address to validate who you are.

Steps for Migrating Your Roles

1. Go to www.sam.gov
2. Create an Individual Account and Login
3. To begin the migration process click either:
   - ✓ "Yes" next to "Would you like to migrate a legacy system account?" on the "My SAM" welcome banner, or
   - ✓ "Migrate Legacy System Account" under "Manage My User Roles" on your "My SAM" page.
4. Select the legacy systems where you have accounts
5. SAM checks to see if your SAM account email address matches your legacy account email address.
   - ✓ If YES, your legacy roles will be automatically migrated to SAM.
   - ✓ If NO, SAM will send an email to your legacy account email address. Click the link in the email and log back in using your SAM username and password. Your roles will now be active.

How do I get more information? Take a look at the SAM User Guide.

Go to Our Website: www.sam.gov

Contact the SAM Help Desk: www.fsd.gov