SAM.GOV

HOW-TO GUIDE

A quick reference guide to register in the System for Award Management
IMPORTANT-FIRST TIME REGISTRANTS

As of March, 2018, first-time registrants in sam.gov will be required to obtain and submit an Entity Administrator notarized letter and submit it to the Federal Service Desk. Here are the steps to complete this.

1. Draft a letter to be notarized. The letter should include the following conditions:
   a. Be on your company/organization letterhead
   b. Be signed by your company/organization President, CEO, or other authorized signature authority
   c. Contain your company/organization DUNS Number
   d. Contain your company/organization Legal Business Name (as associated with the DUNS Number)
   e. Contain your company/organization physical address (as associated with the DUNS Number)
   f. Contain the new Entity Administrator’s name, phone number, address, and email address (this can be either you or the individual that will be responsible for maintaining the sam.gov registration)
   g. The following language is required above the signature block of your letter (do not change the language outside of what is bolded):

      “The purpose of this notarized letter is to designate [insert name of Entity Administrator] as Entity Administrator for [insert Legal Business Name]. I, [insert Name and Title of signatory], hereby confirm that [insert name of Entity Administrator] is an authorized officer, agent, or representative of [insert entity Legal Business Name, or, for individuals representing themselves, say him/herself]. This letter will authorize [insert name of Entity Administrator] to have access to the System for Award Management (SAM). SAM is a computer system managed by the U.S. Government, and it is only accessible by individuals who are either authorized to represent a particular entity, or by individuals representing themselves. Accessing or using SAM, or information contained therein, for any unauthorized or illegal purposes, may have civil and criminal penalties, and may negatively impact the status of the SAM registration maintained on this entity. I, the below-signed, attest to the accuracy of all information contained in this letter.”

2. If you choose to have a third-party company administer your registration, you will be required to include the following language:

   “For the purpose of registering with the United States Government through the online System for Award Management (SAM), I do hereby authorize [insert name, phone number, address, and email address of the Third-Party Agent] to act on behalf of [insert entity Legal Business Name, DUNS Number, physical address, authorizing party’s email address, and phone number]. This authorization permits [insert name, phone number, address, and email address of the Third-Party Agent] to conduct all normal, common business functions within SAM while binding the signatory to all actions conducted and representations made as a result of authorization granted herein.”
3. If you will not have a third-party company managing your sam.gov registration, please include the following statement **AFTER** the primary body of the letter:

“For the purpose of registering with the United States Government through the online System for Award Management (SAM), I do not authorize any third party to act on behalf of [insert entity Legal Business Name].”

4. Letters omitting either the third party authorization referenced in Step 2 or the statement referenced in step 3 (above) will be considered unacceptable. Please include either the language in step 2 or step 3 **IN ADDITION TO THE MAIN PRIMARY LANGUAGE IN STEP 1!**

5. You or the entity administrator must have an individual SAM User Account created with email address provided in the letter prior to submitting the letter.

6. Submit the original letter signed by the authorized signature authority AND the notary to the following address:

   **Federal Service Desk**

   **Attn: SAM.GOV Registration Processing**

   100 Capitol Commerce Blvd., Suite 309

   Montgomery, AL 36117-4260

7. Once your letter is received and processed, you will receive an email confirming your active registration.

8. This process applies to **NEW ENTITY REGISTRATION ONLY!** Renewals do not require this process.
How to create a user account

1. Go to sam.gov, and click on Create A User Account.

2. Click on Create Individual Account.

3. Fill in all data slots with a red asterisk. This includes name, email address, phone number, username, password, and security questions.
4. Once you fill everything in, click **Next**. Then, confirm all information and click **Submit**. You should receive an email that looks like this. Click on the link below your username to activate your account. You will be asked to login.

5. Once you login, you should receive a screen confirming activation. You will then be asked to agree to usage terms. Click **Agree**. You should then be taken to your MySAM page. Congratulations, you are officially registered in sam.gov!!
Navigating the MySAM Portal

Once you arrive to your MySAM portal, there are five main areas you can navigate to.

- **My User Roles**
  - **My Roles** allows you to search for an entity and see what your assigned role and permissions are.
  - **Invitations** is where any pending invitations to join an entity or receive roles is located.
  - **Migrated Accounts** only applies if you had previous accounts with old federal contracting and registration databases. New users can ignore this function.
  - **Request Role with New Entity** allows you to request a role with an entity.

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2. Entity Registrations

- **Register New Entity** allows you to sign up your organization into the SAM system.

- **BioPreferred Reporting** is not applicable to our functions and can be ignored.

3. My Account Settings

- **Edit User Information** allows you to edit your personal information within your account.

- **Deactivate User Account** allows you to deactivate your account if you wish.

4. My Data Access

- **General Information** tells you a little bit about data access and whether you would need it.

- It appears this applies to Federal Government employees only. You can likely disregard this.

5. General

- **My Save Queries** allows you to look back at previous searches and inquiries that you have completed.
How to Register your Organization

-To register your organization, click on **Entity Registrations** on the left hand side of the screen. When that opens, click on **Register New Entity**.

-You should then see this screen. This will lay out everything that you will need. Each section has a drop down option to see your status.

**NOTE:** You will only be asked to fill out the **Core Data** and **Points of Contact** sections. If you are interested in bidding on federal contracts, you will be asked to complete all four sections.

-When you are ready, click **Start Registration**.
- After you click **Start Registration**, a pop-up window will appear explaining what you will need. As a recap, the following items are needed prior to registering:

- **DUNS Number**
- **Legal Business Name**
- **Physical Address**
- **Taxpayer Identification Number (TIN/EIN)**
- Your bank’s routing number, account number, and account type for EFT

- Once you are ready with this information, click **Continue**.

- The beginning of the registration asks for the type of entity your organization is, and why you are registering.

  - For question 1, select the most appropriate organization.
  
  - For question 2, select the answer stating **“I only want to apply for federal assistance opportunities like grants, loans, and other financial assistance programs.”**

  - **NOTE:** If counties, larger municipalities, and state agencies have interest in bidding on federal contracts, please select that option. This is **NOT RECOMMENDED** for most municipalities.

- When you are ready, click **Next**.
- In this section, you will need to enter your DUNS information. Enter your DUNS Number, DUNS Legal Business Name, and DUNS Physical Address.

- NOTE: THIS INFORMATION HAS TO MATCH EXACTLY TO THE DUNS DATABASE! Otherwise, it will not work.

- If you need to sign up for a DUNS number, please reference the link in the Additional Information Section of this document.

- Once completed, click Next.

- You will then be asked to verify the information. If everything looks accurate, click Save and Continue.

- Next, you will need to enter your business information and mailing address. You will be asked to create a MPIN, which acts as a password as you work through this system. The MPIN has to be 9 characters with one number. IT IS IMPORTANT TO WRITE THIS DOWN, AS YOU WILL NEED IT LATER!

- At the bottom, you will be asked to input your Taxpayer Identification Number (TIN/EIN).

- Once you complete everything, click Save and Continue.
-You then proceed to the IRS Consent to Disclose Tax Information to the SAM Program office. In this section, please enter the information as it shows up on your most recent tax return. You will then need to enter your MPIN that you created.

-If you do not know this, I would recommend contacting your county or local clerk and/or your local treasurer.

-Once you are complete, click Save and Continue.

-Once you complete the Consent to Disclose section, you are open to move around all of the different sections as you wish. The first four sections must be completed in order to proceed.

-You will then be asked whether your organization has a CAGE number. If you do not have a CAGE number, you will be given one upon completion of this registration.

-Click Yes or No, and enter your CAGE code, if applicable.

-When you are ready, click Save and Continue.
-The **General Information** section will ask you three questions. Please answer all questions as appropriate.

-When completed, click **Save and Continue**.

-In the **Financial Section**, you are required to input a bank account for Electronic Funds Transfer (EFT). You will need your municipalities **account type**, **routing number**, and **account number**.

-**NOTE**: For all Public Assistance and Hazard Mitigation Grant Program grants, you will receive a **paper check** from WEM, and will never receive payment directly from FEMA. Unfortunately, you will not be able to submit your registration without this information.

-You will also need to put in a phone number for Automated Clearing House (ACH) and the address for the department on the bank account.

-Once completed, click **Save and Continue**.
-The **Executive Compensation Questions** asks about whether your organization has received a certain amount of annual gross revenue (pre-tax dollars you earn in within one year) from the US Federal government.

-Please answer **Yes** or **No**. If you answer **Yes**, you will then need to answer the second question.

-Once complete, click **Save and Continue**.

-In the **Proceeding Questions** section, you will answer the first question to the best of your ability. The first question is asking if you are applying for a Federal grant or contract opportunity in which the amount you are applying for exceeds $10,000,000.00.

-Please answer **Yes** or **No**. If you answer **Yes**, you will need to answer the next question. If you respond **Yes** to the second question, you will then need to answer the third question.

-Once completed, click **Save and Continue**.
- In the **SAM Search Authorization** section, you can decide if you want your non-sensitive information to appear in the SAM public search engine. This decision is solely up to you and your organization. If you want your organization to appear in the search, check the box.

- Once complete, click **Save and Continue**.

- You will then be taken to the **Review** section. Here, please take a minute to review all of the information you inputted.

- Once complete, click **Save and Continue**.

- You will then move to the **POC Details** section. Here, you have three point of contacts you can put in: one for **Accounts Receivable**, one for **Electronic Business**, and one for **Government Business**.

- If you do not have separate individuals for these functions, please put the information in under **Accounts Receivable**, and then click **Copy From** at the top of the remaining sections to copy that information over.

- Once completed, click **Save and Continue**.

- You will then transition to the **Entity Review** section. Here, you will review all information you provided. Once you have reviewed everything, click **Submit**. You will receive a confirmation email upon submission.
- If you are not able to finish your registration, you can come back to complete it. Ensure you click **Save and Continue** prior to exiting, as you will lose all unsaved data.

- When you return, go under the **Entity Registration** section, and click on **Existing Entity Registration**. Your organization registration should be found under **Entity List**.

**Additional Information**

- You must be registered in SAM prior to submitting an application for federal funds and you must certify that you will maintain an active SAM registration at all times during which you have an active federal award (2 CFR Part 25.200).

- Once you submit your registration, please allow **10-14** business days for your SAM registration to become active. You will receive an email once your registration is activated.

- Please save frequently. If you are inactive for 30 minutes or greater, sam.gov will log you out, and you will lose all unsaved data.

- We strongly advise completing this process prior to requesting payment to prevent delays in the reimbursement process. **PAYMENT WILL NOT BE MADE IF YOUR ORGANIZATION IS NOT REGISTERED IN SAM.**

- SAM registration needs to be renewed annually. If you do not maintain your SAM registration, you may not receive payment until you renew your registration. We recommend putting a note in one’s calendar about 30 days prior to expiration.

- If you have any troubles with sam.gov, please contact the Federal Service Desk ([https://fsd.gov/fsd-gov/home.do](https://fsd.gov/fsd-gov/home.do)).

- **Helpful links**
  - DUNS Number Sign-Up: [https://www.dandb.com/product/companyupdate/companyupdateLogin?execution=e1s1](https://www.dandb.com/product/companyupdate/companyupdateLogin?execution=e1s1)
  - SAM Quick and Full User Guides (If you have something specific you want to reference)
    - Go to your MySAM portal, and click on **Help** along the top of the screen.