

# SAM Registration - It's a Whole New Ballgame

Presented by:  
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# System for Award Management (SAM)

- ▶ An evolving system to consolidate ten distinct databases used by government and non-government entities in the transaction of business. Key goals:
  - ▶ A single, common, secure point of entry
  - ▶ Consistent look, feel and functionality across many diverse uses & users
- ▶ **CAUTION!**
  - ▶ The consolidation is not 100% complete
  - ▶ A major step in the consolidation became effective 5/24/2021



# Functions Now Consolidated in SAM

- ▶ From SAM.gov
  - ▶ Entity registration
  - ▶ Exclusions
  - ▶ Entity reporting (SCR and BioPreferred)
  - ▶ Disaster response registry
- ▶ From beta.SAM.gov
  - ▶ Contract opportunities
  - ▶ Contract data reports
  - ▶ Wage determinations
  - ▶ Assistance listings
  - ▶ Federal hierarchy



# SAM Registration

We're going to cover one of the 10 components of SAM today:

## **Entity Registration**

- SAM registration is required of all federal government contractors, and SAM information is often also used by companies as well as government agencies.
- In this presentation we'll outline how the SAM system is used (and sometimes misused) to compile key information about firms.



## Tips on using [www.login.gov](https://www.login.gov):

- Access to SAM is via Login.gov
- Keep your email address current!
- Establish multiple two-factor authentication pathways
  - Text(s)
  - Phone(s)
  - Emails(s)
  - App
- Multiple people should have login.gov accounts.



# Recent SAM Changes!!

- ▶ SAM cutover to beta.SAM
  - ▶ As of May 24, beta.SAM dropped the “beta” and SAM.gov now contains all current SAM functions.
- ▶ Shift from DUNS# to Government-supplied UEID
  - ▶ The change is underway, but no worries
  - ▶ Your new ID appears automatically in your SAM
  - ▶ DUNS won't go away, yet (target date is April 2022)



## SAM Look-alikes – they just won't go away

- ▶ Look at the email address – if it's not from a .gov or .mil, it's probably a scam.
- ▶ Read the fine print.
- ▶ If they ask for a credit card number, **run!**
- ▶ When in doubt, forward it to your local PTAC. They'll give you a professional opinion.



Let's go live into SAM:



[www.sam.gov](http://www.sam.gov)





# DUNS #, Address Stuff, Secretary of State & IRS Consistency

Until it changes (and change is in the works, to be completed in 2022), DUNS is where SAM gets your address. DUNS is also where you change your address in SAM.

Close agreement with IRS and State (usually the Secretary of State or Department of Corporations) is important.




## Email addresses – they're really important:

- ▶ Changing your email address, for whatever reason, should set off alarm bells in your head. Who do you have to notify? **Everybody.**
- ▶ A key email address may change when someone **leaves the business.**



# SAM Registration Roles

- ▶ Every SAM account has an Entity Administrator
  - ▶ Appointed by management
  - ▶ Documented in a **notarized letter**
  - ▶ Can update SAM
  - ▶ Can appoint others and bestow privileges
  - ▶ **Must** appoint a successor – requires a new notarized letter.



**Timely update/renewal**  
(at least 2 weeks before expiration\*)  
**or**  
whenever you have a *material change*

- ▶ Physical move
- ▶ Add NAICs codes; change primary NAICs
- ▶ New Entity Administrator or POC
- ▶ Ownership/Affiliation change
- ▶ Any change that might affect size determination

\*current 180-day extension for renewals – lack of clarity in SAM



## MPIN & Changing your MPIN

- ▶ You establish your MPIN in SAM – you will (rarely) use it for certain critical signatures.
- ▶ **Don't lose your MPIN**
  - ▶ You don't need it very often - when updating SAM, applying for WOSB.
  - ▶ You can reset it in SAM, but often you can't when you most need to.



## Size Matters in SAM

- ▶ SAM makes a determination of your business size. It generally uses one of two criteria:
  - ▶ Number of Employees (12\* month average)
  - ▶ Average annual revenue (3 or 5 year average – you choose until 1/6/2022) per 13 CFR 121.104
  - ▶ Moving to 5 year average on January 7, 2022
- ▶ SAM compares these data to the size standards for each of your NAICS codes.

\*This is likely to increase soon to a 2-year average.



## NAICS & PSC; primary NAICS selection

- ▶ Look up your NAICS codes [here](#). Choose as many as make sense for your products/services.
- ▶ Don't rely on the wholesale or retail codes – they're not supposed to be used in government contracting.
- ▶ Pick your **primary** – the one that best describes where the largest component of your revenue comes from.
- ▶ Pick your PSC/FSC code(s) [here](#).

## SAM Points of Contact & Notarized Letter

- ▶ You are allowed to have a number of POC types. You must have at least an Electronic Business POC and an Accounts Receivable POC – can be the same person.
- ▶ Ideally, have at least two different POCs.
- ▶ You can use the clever “copy” feature to populate the different POC fields.
- ▶ You may have several additional types of POC (e.g: Past Performance) plus alternates.
- ▶ Reminder: An Entity Administrator must be appointed. This currently requires a hard copy, notarized letter submittal. SAM provides a template for the letter. Changing your Entity Administrator will require a new notarized letter.






## Small Disadvantaged Businesses (SDB)

- ▶ About half of all businesses that think they are SDBs actually don't qualify
- ▶ Most of them meet the economic disadvantage criteria,  
**but:**
- ▶ **You also must be socially disadvantaged.**
- ▶ Women-owned and veteran-owned businesses **are not** on the socially-disadvantaged list.

## The following individuals are presumed to be **socially disadvantaged**:

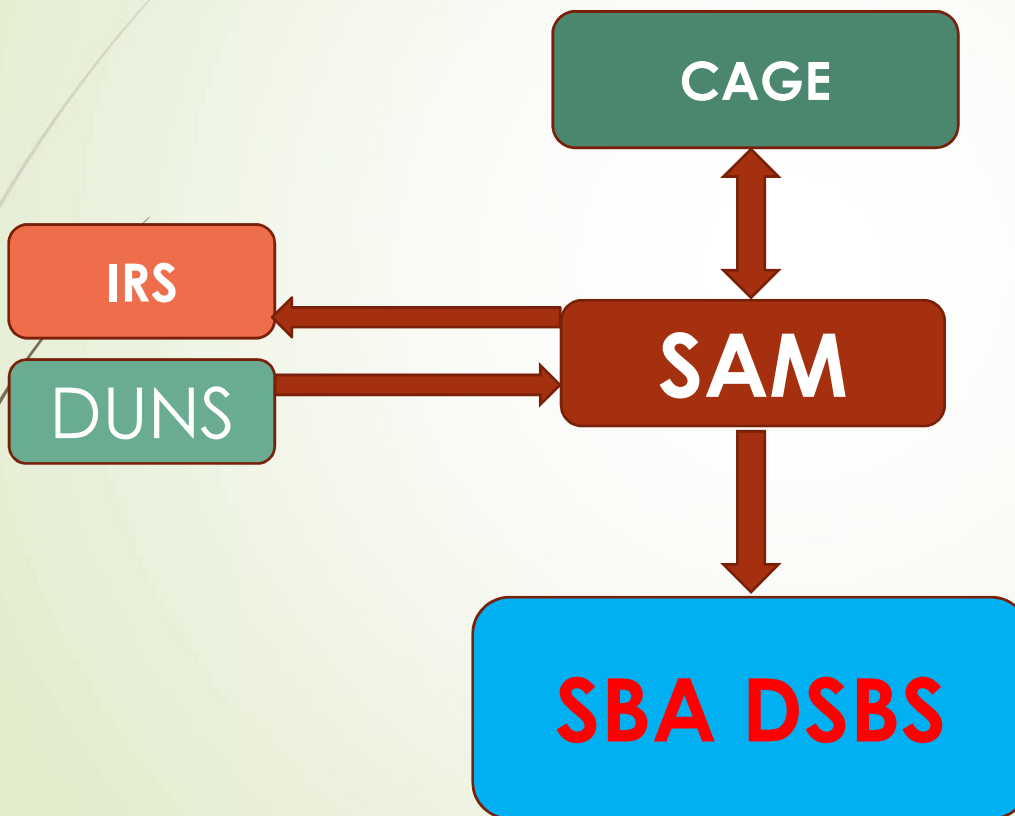
- ▶ **Black Americans**
- ▶ **Hispanic Americans**
- ▶ **Native Americans** (Alaska Natives, Native Hawaiians, or enrolled members of a Federally or State recognized Indian Tribe)
- ▶ **Asian Pacific Americans** (persons with origins from Burma, Thailand, Malaysia, Indonesia, Singapore, Brunei, Japan, China (including Hong Kong), Taiwan, Laos, Cambodia (Kampuchea), Vietnam, Korea, The Philippines, U.S. Trust Territory of the Pacific Islands (Republic of Palau), Republic of the Marshall Islands, Federated States of Micronesia, the Commonwealth of the Northern Mariana Islands, Guam, Samoa, Macao, Fiji, Tonga, Kiribati, Tuvalu, or Nauru)
- ▶ **Subcontinent Asian Americans** (persons with origins from India, Pakistan, Bangladesh, Sri Lanka, Bhutan, the Maldives Islands or Nepal)
- ▶ **Being born in a country does not, by itself, suffice to make the birth country an individual's country of origin for purposes of being included within a designated group.**
- ▶ **(2) An individual must demonstrate that he or she has held himself or herself out, and is currently identified by others, as a member of a designated group if SBA requires it.**



# Recommended Reps & Certs Coping Strategy

- ▶ Do at least one detailed run-through of the Reps & Certs.
  - ▶ On your own, with your attorney, or with your PTAC
  - ▶ Categorize the many clauses based on their applicability to you:
    - ▶ The “Now” clauses – must comply now
    - ▶ The “Watch” clauses - monitor, because they may turn into “Now” clauses
    - ▶ The “Ignore – for now” clauses – they clearly don’t apply to your business as configured now or in the foreseeable future.
  - ▶ Invest the effort in understanding and complying with the “Now” clauses.
  - ▶ Diligently monitor the “Watch” clauses for changes or threshold events
  - ▶ Periodically review the “Ignore – for now” list
- ▶ Monitor for brand-new Reps & Certs.

# SAM is Connected to Many Things – Here's a Few:





# The Dynamic Small Business Search

- ▶ Outstanding tool for Market Research
- ▶ Free advertising!
- ▶ Devote some time and thought to what you put in the DSBS
  - ▶ Capabilities Narrative
  - ▶ Keywords
  - ▶ References?
  - ▶ Exports?



# Dynamic Small Business Search (DSBS)

- ▶ Purpose: to enable searches for small businesses. You can search by:
  - ▶ Geography
  - ▶ Certifications -
  - ▶ NAICS codes **or keywords**
  - ▶ Sector (manufacturer, construction etc.)
  - ▶ Bonding, QA, Size
  - ▶ DUNS, CAGE, Name
- ▶ Important to complete, particularly the **Capabilities Narrative**



## SBA Search Results

View	Name and Trade Name of Firm	Contact	Address and City, State Zip	Capabilities Narrative
1	<a href="#">Howarth Granite Holdings LLC</a> Elegantly Set In Stone	Susanne Howarth	<a href="#">2703 PHILADELPHIA PIKE STE D CLAYMONT, DE 19703-2571</a>	
2	<a href="#">Humphrey House Studios LLC</a>	Malika Humphrey	<a href="#">17 Cheswold Blvd Apt 2d Newark, DE 19713-4128</a>	
3	<a href="#">NFN BRAIN CONNECTIONS, INC.</a>	Natashia Brown	<a href="#">1057 S Bradford St Dover, DE 19904-4141</a>	
4	<a href="#">Blue Ocean Systems LLC</a>	ELEANOR S. Wu	<a href="#">3511 SILVERSIDE RD STE 204 WILMINGTON, DE 19810-4902</a>	
5	<a href="#">IT Resources Inc.</a>	Harish Koya	<a href="#">220 Continental Dr Ste 104 Newark, DE 19713-4304</a>	
6	<a href="#">Married to the Ring, LLC.</a> Tanya Williamson & Associates	Tanya E Williamson	<a href="#">401 JUSTISON ST APT 222 WILMINGTON, DE 19801-5291</a>	A women-owned business that provides comprehensive training designed to help couples and singles achieve their goals in relationship and family. And we also provide comprehensive training on how to nurture and build successful, productive professional relationships in the workplace.
7	<a href="#">DATA SOLUTION CENTRAL INC</a>	AMY Silfen	<a href="#">103 FOULK RD STE 202 WILMINGTON, DE 19803-3742</a>	Computer Equipment Computer Peripherals Computer Accessories
8	<a href="#">Interjet West, Inc.</a>	Holly Czapich	<a href="#">1013 Centre Rd Ste 403a Wilmington, DE 19805-1270</a>	
9	<a href="#">Happy Helpers Home &amp; Office Services, LLC.</a>	Kendra Perry	<a href="#">961 Janvier Ct Middletown, DE 19709-1744</a>	Woman-Owned Commercial and residential janitorial services company that specializes in vacancy clean- outs,laundry services and janitorial services.



## Links to Key Resources:

- ▶ SAM: <https://www.sam.gov/SAM/>
- ▶ Login.gov: <https://www.login.gov/>
- ▶ Federal SAM User Guide:  
[https://sam.gov/SAM/transcript/SAM\\_Federal\\_User\\_Guide.pdf](https://sam.gov/SAM/transcript/SAM_Federal_User_Guide.pdf)
- ▶ DSBS: [https://web.sba.gov/pro-net/search/dsp\\_dsbs.cfm](https://web.sba.gov/pro-net/search/dsp_dsbs.cfm)





## Shameless Commercial:

- ▶ PTACs offer free assistance with all this & more.
- ▶ You must have a physical presence in the PTAC's service area
- ▶ You have to sign up online.
- ▶ To continue “active client” status, you have to use them as a resource.



# Thank You for Your Attention Today!

- ▶ For free and confidential assistance with any government contracting issues, please contact us:

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Concord, NH 03301

[www.nheconomy.com/ptac](http://www.nheconomy.com/ptac)

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