

## **Registering a New Entity in SAM.gov**

SAM.gov is an official website of the United States government. There is NO charge to register or maintain your entity registration record in SAM.gov.

#### What is an entity?

The term "entity" refers to prime contractors, organizations or individuals applying for assistance awards, those receiving loans, sole proprietors, corporations, partnerships, and any U.S. federal government agencies desiring to do business with the government. "Entity" can also refer to a party that has been suspended or debarred, is covered by a prohibition or restriction, or is otherwise excluded from doing business with the government.

#### What is entity registration?

An entity registration allows you to bid on government contracts and apply for federal assistance. We will assign you a Unique Entity ID as part of entity registration.

Comprehensive and current entity information is essential for the federal award process. It is important to prepare your information and allow sufficient time to understand and accurately complete your registration. You only need to complete and manage it here to remain eligible for federal awards. You must renew your registration every 365 days for it to remain active.

## What do I need to get started?

Registrations require you to enter a lot of information about your entity. Information includes, but is not limited to your:

- entity's legal business name
- physical address
- tax identification number (TIN)
- CAGE or NCAGE code
- information about the types of goods and services you provide
- entity size
- optional Electronic Data Interchange (EDI) information
- disaster relief data
- representations and certifications
- points of contact

Visit the <u>Get Started</u> page at SAM.gov to view checklists and guides to help you prepare for registration. If you already have a Unique Entity ID but have not completed registration, <u>go to this</u> <u>section</u>.





### **Start Registration**

When you are ready to start a new entity registration, go to SAM.gov and follow these steps:

- 1. Select the "Sign In" link at the upper right corner of the page. Select "Accept" to accept the U.S. Government System terms. After selecting "Accept," the system will redirect you to login.gov.
- 2. Login.gov is a service that manages usernames and passwords for SAM.gov. If you already have a login.gov account, sign in with your credentials. Otherwise, select "Create An Account" and follow the prompts.
- 3. Once you are signed in, the system will redirect you to your SAM.gov Workspace.
- 4. On the "Entity Management" widget in the Workspace, select the "Get Started" button.
- 5. On the next page, select the "Register Entity" button.
- 6. On the next page, you will choose your entity type and your "Purpose of Registration."
  - a. Select your type of entity. Choose "Business or Organization" if you are NOT a U.S. State, U.S. Local, Tribal, or Foreign government entity.
  - b. There are two types of registration purposes: Financial Assistance Awards and All Awards.
    - i. An All Awards registration allows you to bid on contracts and other procurements, as well as apply for financial assistance. This type of registration requires more information.
    - ii. A Financial Assistance Awards registration allows you to apply for financial assistance, or grants and loans, **only**. This type of registration requires less information.
  - c. Select your registration purpose, then select "Next."
- 7. The next two pages display your choices from the Purpose of Registration page and a summary of the information you need to have prepared to complete your registration. Review the pages to make sure you are ready to start. Confirm your selections and select "Go back" if you need to change your purpose of registration or entity type. If your information is correct, select "Next."
- 8. Here you will start to enter information about your entity. Enter your legal business name and physical address, then select "Next."
- 9. Your entity name and address will be <u>validated by SAM.gov</u>. The next page will show an entity matched in SAM.gov. If your entity information is correct, select "Next."
  - a. If the match shown is not your entity or you are unable to find a match, you can <u>create</u> <u>a help ticket</u> with the Federal Service Desk (FSD) from the page. Select the "Create Incident" button to contact the FSD for assistance.
- 10. On this page, you will choose whether to allow your entity record to be publicly displayed in SAM.gov. Note that if you deselect this box and restrict the public display of your entity, only you and federal government users will be able to view your entity record.





11. Then, you must certify under penalty of law that you are authorized to conduct transactions for the entity. Then, select "Receive Unique Entity ID." If your entity is a part of a larger organization, you must be granted the Entity Administrator role to continue registration.

# Entity Administrator Approval Process for Entities with an Organizational Hierarchy

If your entity is a part of a larger organization, your registration will trigger a role request to the Entity Administrator of the higher-level organization for you to continue registration.

The administrator must review and approve your request before you can register the entity. You will receive an email notification from donotreply@sam.gov when the administrator makes their decision. If approved, you will be able to proceed with your registration. If rejected, the draft record will be deleted from the system.

Your entity registration will remain in draft status until the review is complete. You will not be able to edit or update the registration until approved by the organization administrator. If the entity administrator does not respond within five business days, then you will be required to <u>submit a</u> <u>notarized letter</u> to gain access as an Entity Administrator. Your notarized letter needs to:

- Be on your company/organization letterhead, and be signed by your company President, CEO, or other authorized signature authority
- Contain your company/organization Unique Entity ID
- Contain the old primary and alternate point of contact's name (if you know it)
- Contain the new entity administrator's name, phone number, address and email address
- Provide a justification for the change

You can <u>find complete instructions and letter templates at FSD.gov</u>. The letter must be notarized, scanned, and submitted to the FSD as described in the linked article.

Note that the new Entity Administrator must have an individual SAM.gov user account created with the e-mail address provided in the notarized letter for the FSD to process your request.

## **Continuing Registration with Approved Entity Administrator Role**

If an administrator approves your role request to be the Entity Administrator or if you are granted the Entity Administrator role through the notarized letter process, you can continue to register the entity. Follow these steps to continue registration:

- 1. Sign in to SAM.gov and, in the Workspace, select the "Work in Progress" bubble on the "Entity Management" widget. A list of your registrations in progress will display.
- 2. Next to the record title you want to access, select the button with the three dots (the Actions menu), then choose "Update" from the menu.
- 3. Enter additional organization information as required. You will create a Marketing Partner Identification Number (MPIN). It is **important to remember your MPIN** as it will serve as your





electronic signature for the IRS Consent to Disclosure of Tax Information on the next page. You will need your MPIN in the future to make updates to your registration.

Continue to enter additional information into each section as required. Your information will be saved when you select "Save and Continue" on each page.

If you exit registration before completing it, you can access it later from your Workspace by following the steps above. If you do not access or submit your registration within 90 days, the system will remove it.

After entering and reviewing your information in each section, select the "Submit" button. You will receive a "Registration Submitted – Confirmation" message on the screen. If you do not see this message, you have not submitted your registration.

## When will my registration become active?

Allow at least **ten business days** after you submit your registration for it to become active in SAM.gov. If your entity fails TIN or CAGE code validation, SAM.gov will send you an email with instructions on updating your information and resubmitting your registration. You may need to work with the IRS or CAGE to update your information before resubmitting your registration.

#### How do I check the status of my entity registration?

If you have a role with an entity and are signed in to your SAM.gov account, you can check your entity registration status. You can also check the status of an entity's registration as a federal user. If none of these is the case, you cannot check an entity's registration status.

- 1. Sign in to SAM.gov. You must be signed in to check your registration status.
- 2. From the home page, select the "Check Registration Status" button. The page is also linked in the footer of all pages on SAM.gov.
- 3. Enter a Unique Entity ID or CAGE Code and select "Search." The entity's registration status will display below.

