SAM registrations training

1. Preparing a notarized letter to get Administrator role for an entity:

   Note: first request a role through SAM.gov in Workspace then use notarized letter
   if you cannot get access from the existing Administrator
   > Add A New Role
   > Entity Registration > Data Entry
   >   I verify I have a business need for this role
   > Request Role
   > Entity: enter UEI#
   > Role: keep as Data Entry
   > Domain: select Entity Registration
   > Additional Details: request Administrator role and identify yourself as part of
   >   Grants & Finance team

2. Walk-thru registration update (best to have copy of existing registration record in SAM and Summary info from legal database)

3. Review current ticket(s) in fsd.gov (can log in easily if log into SAM.gov first)

To download existing registration record in SAM:
   Go to: Workspace > Entities
   Enter entity UEI in search box and hit search
   Click on options (circle with 3 dots) and select: <u>View Record</u>
   Then there is an option at the top: <u>Download</u>   (select PDF then rename file)

1…REMOVING USER ROLE FOR AN ENTITY
Workspace
<u>User Directory</u> link
Enter entity DUNS# and select entity that auto-populates below
Click on name of user to remove
From the left menu, select: Roles   (note: *wait for full download* of roles – can take several minutes)
A list of roles populates – use the Delete icon to remove role (also can Edit)

2…UPDATE AN ENTITY'S REGISTRATION
Preparation steps:
Will need to: 1st - Download current report in SAM for the entity:
                  #1-search Workspace by UEI#, #2 click on actions (3 dots) tab –> View Record

Workspace – search for entity

Click on entity name

Select: I would like to update / renew my entire Entity Registration.

       My purpose of registration is still the same – NEXT

Select: I verify the address above matches my entity's physical address. – NEXT

You have the following steps left to complete – CONTINUE

Core Data – Business information (typically does not need updating) – SAVE AND CONTINUE

Core Data – IRS consent: update tax year/latest taxes and sign if more recent tax year is available –

       enter your Name of Individual and Title – enter MPIN as signature – SAVE AND CONTINUE

Core Data – CAGE code: SAVE AND CONTINUE

Core Data – General Information: select

       Entity Security Level: Not Applicable

       Highest Employee Security Level: Not Applicable

       scroll down – SAVE AND CONTINUE

Core Data – Financial Information:

       Do you accept credit cards as a method of payment: NO

       If necessary, Update Banking Information

       If necessary, update remittance address:

       Name:

       Address line 1:

       Address line 2:

       City:

       State/Province:

       Zip:

Core Data - Executive Compensation – SAVE AND CONTINUE

Core Data – Proceedings Questions – SAVE AND CONTINUE

Core Data – Review Core Data – review and if all looks correct, SAVE AND CONTINUE

Representations and Certifications – Financial Assistance Response –

       Check box at bottom of page: "I have read each of the certifications…"

       SAVE AND CONTINUE

Points of Contact – POC details – update as needed to:

       Accounts Receivable POC:

       Electronic Business POC:

       Government Business POC:

       SAVE AND CONTINUE

Review all details and if OK, hit: SUBMIT button at bottom of the page

Receive confirmation and next steps message:

You successfully submitted your entity registration. This registration record will remain in Submitted status until all external validations are complete. This process is entirely FREE to you. It is FREE to register and maintain your registration in SAM. It is FREE to get help with your registration.

What happens next?

1   If you provided a Taxpayer Identification Number (TIN), the Internal Revenue Service (IRS) will conduct a validation of your TIN and Taxpayer Name. This could take two business days. You will get an email from @sam.gov when that review is complete.

2   Your registration will then be sent to the Defense Logistics Agency (DLA) Commercial and Government Entity (CAGE) Code system for assignment or validation of your CAGE Code. This also is a FREE service. This step averages two business days, but the DLA CAGE team can take up to ten business days, or longer, in peak periods. You will get an email from @sam.gov when that review is complete.

3   If the DLA CAGE team has any questions, they will contact the individual you listed as the Government Business Point of Contact (POC) via email. The email will come from an @dla.mil address. Please tell your Government Business POC to respond right away to any requests from an @dla.mil email. If a timely response is not received, your registration will be returned to SAM and your registration status changed to Work in Progress. You will have to resubmit and provide the requested information to DLA CAGE to continue.

4   You will get an email from @sam.gov when your registration passes these external validations and becomes Active. While you are waiting, select Check Status on the SAM.gov homepage to see where your registration is in the review process.

3…UPLOADING A NOTARIZED LETTER

fsd.gov – log in
Need Help link – Create an Incident
*System Name: System for Award Management (SAM)
*Is this related to a Special Project: -- None –
*Issue Type: SAM: Notarized Letter
*Business Type: Grants
*Subject: Administrator assignment to multiple Entities
*Please describe the issue below:
        Requesting Administrator assignment for multiple Entities
*Entities Covered by this Letter: Multiple
*Account Administration Preference:
        Self-Administration Confirmation
          Attestation – Signed
          Has the form been notarized?
Add Attachments
then scroll back to the top of the form: Submit
this creates a ticket number (fsd will send email updates on ticket status)

4…MPIN RE-SET INSTRUCTIONS

Log on and go to Workspace
Search for the entity
From the Actions menu (3 dots on right) select: Update
Go to page: Business Information
Next to the existing MPIN preview (ex: *****0160) – select: UPDATE
Forgot your MPIN – select: RESET MPIN
A reset link will be sent to your email – copy link and open in Microsoft Edge browser
Would you like to reset – select: Yes
Hit: SUBMIT
Select: DONE

5…HOW TO REVIEW/APPROVE ROLE REQUESTS

Log on and select from top right menu: Requests (should show a red pin next to it)
Scroll down to box on the left menu and select: Role Requests

Pending requests show at the top of the list
Click on a specific request and it opens in a new window
At bottom of new window, select either: Reject or Assign Role
Fill out comments section if Reject
Can also send comments to chat with the Admin of the entity re: role assignments

6…HOW TO REGISTER A NEW ENTITY

In advance, have the Entity Information for the EIN# for reference as to legal name and legal address.
Log on and the home screen should show this under Entities section: Get Started
Then select: Register Entity
Select: ◉ Business or Organization
Select: ◉ I only want to apply for federal assistance opportunities like grants, loans, and other financial
         assistance programs.
Scroll down to: Next
Scroll down to: Next
Enter Entity Information: enter business legal name and complete address (including zip+4*)
Next step: Validate information – find name and address match
Next step: Request UEI
      This entity will now show up in your Workspace under: **Pending ID assignment** (note: SAM is
      supposed to provide a UEI within 30 days of this request)
Next step: can Continue Registration
Core Data screen: Continue

Enter:	Entity Start Date	formation date/incorporation date
	Fiscal Year End Close Date:	
	Entity Division Name	use for DBA names
	Create MPIN	
	Mailing address:	COPY PHYSICAL ADDRESS or enter if different
	TIN Type: (select a value)	EIN
	EIN	enter EIN#

Save and Continue

IRS Consent screen
Use information from W9 for Taxpayer Name, Address, tax year (latest 990 filing year) add your name
    And title for Executing Consent
Signature: enter MPIN
Save and Continue

CAGE Code
Does your entity already have a CAGE code?   No
Save and Continue

General Information	
Country of Incorporation	United States
State of Incorporation:	Domestic Jurisdiction
Entity Security Level:	Not Applicable
Highest Employee Security Level:	Not Applicable
Institution Type:	Hospital
Entity Structure:	Corporate Entity, Tax Exempt
Profit Structure:	Nonprofit Organization

Scroll down to bottom

Save and Continue

Financial Information
Do you accept credit cards as a method of payment: NO
Enter banking information for grants bank account:
        ABA Routing Number:
        Account Number:
        Lockbox Number:
A.C.H.U.S. Phone:
A.C.H. Email:
Remittance Address:
Name   enter entity name
Address line 1:
City:
State/Providence:
Zip/Postal Code:
Save and Continue

Executive Compensation Questions
Executive Compensation (Please select a value):   No
Save and Continue

Proceedings Questions
Proceedings (Please select a value):   No
Save and Continue

Next page is to review all of the information entered – if correct:
Save and Continue

Federal Assistance Response
Does xxxxx wish to apply for a Federal Assistance project or program…   Yes
Scroll to the bottom, check the box next to "I have read each of the certifications"

POC Details
Accounts Receivable POC
Electronic Business POC

Government Business POC
Save and Continue

Next page is to review all of the information entered – if correct:
Submit
Next you will see a Confirmation Page – next goes through TIN/EIN validation then CAGE code set-up

*The USPS site can be used to sear