

# **SAM and DUNS Presentation A/OPE/EAD October 2017**

**If you would like to be eligible for contract awards above US\$30,000 with the U.S. Government, then you need to read the following instructions carefully.**

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

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# Why?

**Having a DUNS number and active SAM registration is a mandatory requirement for any interested entity to be eligible for contract awards above US\$30,000**

*“Only contractors with a valid DUNS number and active SAM will be qualified and be eligible for awards contracts above US\$30,000”*

# General Instructions

## What do I need to get started

**Before you proceed with SAM registration, you must have NCAGE Code and a DUNS number.**

1. If you do not have NCAGE Code, you can request one for free by visiting the NATO Codification Tools webpage at:

<https://eportal.nspa.nato.int/AC135Public/scage/CageList.aspx>

2. 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>

# General Instructions for Registering in DUNS / SAM

## IMPORTANT FACTS

1. There is no registration fee for DUNS or SAM for any organization. There are businesses that will assist in registration for a fee, but you are not required to make payment to any DUNS representatives for purposes of being awarded USG contracts, grants, or cooperative agreements.
2. All organization/entity information **MUST BE IDENTICAL IN DUNS, NCAGE and SAM.** You cannot enter one address for DUNS and then a different address for SAM. This will cause a system error and result in significant delays. You cannot have unequal spacing between words in the primary contact information fields. Be very precise when entering all data.
3. For SAM Customer Service, contact:  
Federal Service Desk: [www.fsd.gov](http://www.fsd.gov)  
US Calls: 1-866-606-8220  
International Calls: 334-206-7828  
You may also contact your DIC point of contact

# General Instructions for Registering in DUNS / SAM

## SAM INSTRUCTIONS TO READ PRIOR TO REGISTRATION

1. Go to [www.sam.gov](http://www.sam.gov)
2. Click on the “Help” Tab.
3. Click on the “FAQs” Tab, read the “SAM User Help” information.
4. Click on the “User Guides” tab, then the “Quick User Guides” tab below.
5. Click on “Full User Guide” and download full instructions for completing SAM registration. This guide contains step-by-step screen shots to assist in the registration process.

# General Instructions for Registering in DUNS / SAM

6. Also under the “User Guides” tab are “Demonstration Videos:”
  - SAM Overview Video
  - Register a New Entity in SAM to be Eligible for Grants and Other Federal Assistance
  - Migrating Your Legacy System Roles
7. For SAM frequently asked questions (FAQs), go to:  
<https://www.sam.gov/portal/public/SAM/>
8. Once you have read through the formal instructions on the SAM website, you can use the instructions for basic reference when entering SAM organizational information.

# 1<sup>st</sup> step

## Request NCAGE Code

Request NCAGE Code by visiting the NATO Codification Tools webpage at:  
<https://eportal.nspa.nato.int/AC135Public/scage/CageList.aspx>

1. Check to see if a NCAGE Code is already assigned for the company.
2. If the search does not result in a match to an existing NCAGE code:
3. Click [Request New] button in the bottom right hand corner of the screen.
4. Follow the directions to obtain an NCAGE Code.
5. Submit the request. A validation email message is sent to the POC in the NCAGE Request for confirmation.
6. Confirm the NCAGE request by clicking on the link embedded in the email.
7. It can take up to ten business days to process a CAGE Code request with a new SAM entity registration

# 1<sup>st</sup> step Request NCAGE Code

1  
<https://eportal.nspa.nato.int/AC135Public/scage/CageList.aspx>

2  
Enter Organization Name and Country

3  
Click Search

NATO Codification Tools

NSPA  
NATO SUPPORT AND PROCUREMENT AGENCY

NMCRl-WEB NMCRl Offline CAGE/NCAGE Code Request ACodP2/3

Home CAGE/NCAGE Code Request

This [link](#) is to a document that explains CAGE/NCAGE procedures. It also includes the process as they relate to registering in and updating data in the System for Award Management (SAM). We highly recommend organizations trying to do business with the U.S. Federal government read the document and follow the instructions. The document also contains points of contact for CAGE/NCAGE matters for the National Codification Bureau.

Search Criteria

When the information on this request form is submitted, a search will become available.

CAGE/NCAGE Code	Postal Code
Organization Name	Phone Number
Country	Identification Number (IDN)
City	

12:53 PM  
9/15/2016

# 1<sup>st</sup> step Request NCAGE Code

[This link](#) is to a document that explains CAGE/NCAGE procedures. It also includes the process as they relate to registering in and updating data in U.S. System for Award Management (SAM). We highly recommend organizations trying to do business with the U.S. Federal government read the document and follow the instructions. The document also contains points of contact for CAGE/NCAGE matters for the National Codification Bureau.

**Search Criteria**

When the search is done, the "Request New" button will become available.

**CAGE/NCAGE Code**

**Organization Name**

**Text**

**Country**

**NUNAVT**

**City**

**Postal Code**

**Phone Number**

**Identification Number (IDN)**

**Results**

NCAGE	Organization Name	City	Postal Code	Country	Status
No matching NCAGE codes were found					

Request New

4

Request New Code

# 1<sup>st</sup> step Request NCAGE Code

The screenshot shows the 'Request New CAGE/NCAGE' web application. The browser address bar displays the URL: <https://eportal.nspa.nato.int/AC135Public/scage/RequestNewCAGE.aspx?country=S1VXQJUI>. The page header includes the NATO Codification Tools logo and the NSPA (NATO Support and Procurement Agency) logo. Navigation links include 'NMCRL-WEB', 'NMCRL Offline', 'CAGE/NCAGE Code Request', and 'ACodP2/3'. The main content area features a 'Country Check' form with the following fields:

- Type of Entity\***: A Private Company
- Emergency Level\***: Select None
- Is the entity to be registered as supranational organization?\***: Yes
- Country\***: KUNAIT

Below the form are 'Cancel' and 'Start' buttons. A yellow oval highlights the form fields, with an arrow pointing to a yellow circle containing the number '5'. Below this circle is a yellow button labeled 'Start entering requested details'. Another yellow oval highlights the 'Start' button, with an arrow pointing to a yellow circle containing the number '6'. Below this circle is a yellow button labeled 'Click Start'. A blue footer bar at the bottom contains the NATO logo. The Windows taskbar at the very bottom shows various open applications and the system clock indicating 2:10 PM on 9/15/2016.

# 1<sup>st</sup> step Request NCAGE Code

Information related to the CAGE/NCAGE request initiator (data not recorded in the CAGE/NCAGE database).  
Please make sure your email address is valid, as your request won't be processed.

**Step 1 of 4: Initiator Data**

First Name\*  
Last Name\*  
Organization Name  
Address

Country  
Type here  
Email\*  
Phone Number  
Fax Number

Cancel Previous **Next**

7

Complete all steps and fill in consequent screens

8

Click Next

# 1<sup>st</sup> step

## Request NCAGE Code

1. After you have filled all requested details and followed the directions to obtain an NCAGE Code, submit your request.
2. A validation email message will be send to the POC in the NCAGE Request for confirmation.
3. You need to confirm the NCAGE request by clicking on the link embedded in the email

# 2<sup>nd</sup> step

## Validate NCAGE Code

### Validate NCAGE Code

- a. When the NCAGE Code is assigned, an email message will be sent to the entity POC in the NCAGE Request.
- b. The new NCAGE CODE information is validated by logging into the NSPA web portal. (<https://eportal.nspa.nato.int/AC135Public/default.aspx>)
  - Click on the tab labelled CAGE/NCAGE Code Request.
  - Enter the NCAGE Code in the first screen, click the Enter key.
  - At the bottom of the screen, a Results box will display. Click on the line of the entity/organization.
- c. NSPA and the appropriate country's NCBs will forward all NCAGE Code information to the U.S. CAGE Program Office. Depending on the assigned country, the data transmission to the U.S. CAGE Program Office will vary from daily/weekly/monthly/bi-monthly/annually based on their internal procedures for transmission to all AC/135 nations.
- d. If the NCAGE Code is not assigned by NSPA/or National Codification Bureau (NCB) then the company entity POC will be contacted by email/letter from NSPA or NCB.

# 2<sup>nd</sup> step Validate NCAGE Code

The screenshot shows a web browser window with the URL <https://eportal.nspa.nato.int/AC135Public/default.aspx> in the address bar. The browser's menu bar includes File, Edit, View, Favorites, Tools, and Help. The website's navigation bar contains links for NMCRL-WEB, NMCRL Offline, CAGE/NCAGE Code Request (highlighted with a yellow circle), and ACodP2/3. A yellow arrow points from the address bar to a yellow box containing the URL, labeled with a circled '1'. Another yellow arrow points from the 'CAGE/NCAGE Code Request' link to a yellow button labeled 'Click Search', labeled with a circled '2'. The main content area features a 'Welcome' section with a list of tools: NATO MASTER CATALOGUE OF REFERENCES FOR LOGISTICS (NMCRL), NATO COMMERCIAL AND GOVERNMENTAL ENTITIES (NCAGE) Tool, and NATO MULTILINGUAL CLASSIFICATION AND ITEM NAME DIRECTORIES (ACODP-2/3). It also lists minimum requirements for using the website: screen resolution of 1024x768 and a browser of IE6+ or Firefox 2+. Below this, there are sections for 'NEW Online Training', 'NMCRL WEB VERSION 3.0', and 'NEW on CAGE/NCAGE Tool Now available in French'. The 'NEW on CAGE/NCAGE Tool' section lists capabilities such as searching on all NATO and non-NATO CAGE Codes, requesting new codes, and proposing updates. At the bottom, there is an 'NCAGE support' email address: [ncage@nspa.nato.int](mailto:ncage@nspa.nato.int). The Windows taskbar at the bottom shows various open applications and the system clock indicating 1:42 PM on 9/15/2016.

1

<https://eportal.nspa.nato.int/AC135Public/default.aspx>

2

Click Search

# 2<sup>nd</sup> step Validate NCAGE Code

The screenshot displays the NATO Codification Tools website interface. At the top, there are navigation links for NMCRL-WEB, NMCRL Offline, CAGE/NCAGE Code Request, and ACodP2/3. The main content area features a search criteria form with the following fields:

- CAGE/NCAGE Code (SKEL)
- Organization Name
- Country
- City
- Postal Code
- Phone Number
- Identification Number (IDN)

A search button is located to the right of the form. Two callouts are present:

- Callout 3: A yellow circle containing the number '3' with an arrow pointing to the 'CAGE/NCAGE Code' input field. Below it is a yellow button labeled 'Enter CAGE Code'.
- Callout 4: A yellow circle containing the number '4' with an arrow pointing to the search button. Below it is a yellow button labeled 'Click Search'.

The website footer includes the NATO logo and a taskbar at the bottom showing various open applications and the system clock (8:30 AM, 9/22/2016).

# 2<sup>nd</sup> step

## Validate NCAGE Code

The screenshot shows the NATO Codification Tools website. The search criteria are: CAGE/NCAGE Code: 3K63, Organization Name: AL FAKR AL 3ND ID CO HLL, Country: KUWAIT, City: KUWAIT, Postal Code: 70661, Phone Number: , Identification Number (IDN): . The results table is as follows:

(N)CAGE	Organization Name	City	Postal Code	Country	Status
3K63	AL FAKR AL 3ND ID CO HLL	KUWAIT	70661	KUWAIT	A

5

Results box will display. Click on the line of the entity/organization

# 3<sup>rd</sup> step

## Validate Information in CSI

### Validate Information in CSI.

- a. Once the NCAGE is received in the CAGE Program Office, the NCAGE Code is displayed in CAGE Search and Inquiry (CSI - formerly Business Identification Number Cross Reference System (BINCS)). This should be used to verify the registration information.
- b. Go to the CSI homepage at (<https://cage.dla.mil/Home/UsageAgree>)
- c. Click "I AGREE" at bottom middle of the page
- d. The easiest way to search in CSI is to search by CAGE/NCAGE or DUNS Number.
- e. The entity/organization's Legal Business Name and Physical Address must match exactly with NSPA, CSI, D&B and SAM.
- f. If the NCAGE does not display in CSI but IS located in the CAGE/NCAGE Code Request, contact the DLA Contact Center at ([dlacontactcenter@dlamail.mil](mailto:dlacontactcenter@dlamail.mil)) reporting this discrepancy.
- g. If all information is current in CSI and CAGE/NCAGE Code Request, proceed to obtain a DUNS Number.

**TIMEFRAME:** CSI is updated after CAGE Program Office has received and processed the NCAGE data which may be up to **10 business days**.

# 3<sup>rd</sup> step

## Validate Information in CSI

1

(<https://cage.dla.mil/Home/UsageAgree>)

2

Click I Agree

**CAGE**  
COMMERCIAL AND GOVERNMENT ENTITY PROGRAM

SEARCH & INQUIRY | REQUEST | UPDATE | NEWS | FORMS | RESOURCES | ABOUT | CONTACT US

### Terms and Conditions

You are accessing a U.S. Government (USG) Information System (IS) that is provided for USG-authorized use only. By using this IS (which includes any device attached to this IS), you consent to the following conditions:

- The USG routinely intercepts and monitors communications on this IS for purposes including, but not limited to, penetration testing, COMSEC monitoring, network operations and defense, personnel misconduct (PM), law enforcement (LE), and counterintelligence (CI) investigations.
- At any time, the USG may inspect and seize data stored on this IS.
- Communications using, or data stored on, this IS are not private, are subject to routine monitoring, interception, and search, and may be disclosed or used for any USG authorized purpose.
- This IS includes security measures (e.g., authentication and access controls) to protect the USG interests—not for your personal benefit or privacy.
- Notwithstanding the above, using this IS does not constitute consent to PM, LE or CI investigative searching or monitoring of the content of privileged communications, or work product, related to personal representation or services by attorneys, psychotherapists, or clergy, and their assistants. Such communications and work product are private and confidential.

This site requires cookies to function properly. Please enable acceptance of cookies if they are currently disabled.

This site has been tested and is operational on Internet Explorer (IE11), Mozilla Firefox (Version 38), and Google Chrome (Version 48).

I AGREE

HOME  
CAGE SEARCH & INQUIRY  
REQUEST | UPDATE

NEWS AND EVENTS  
FORMS  
RESOURCES  
TERMS OF USE

ABOUT  
CAGE  
DUNS  
SAM  
Ownership Of Offeror

COMMERCIAL AND GOVERNMENT ENTITY PROGRAM

# 3<sup>rd</sup> step

## Validate Information in CSI

The screenshot shows the CAGE Search & Inquiry website interface. The browser address bar displays <https://cage.dla.mil/Search>. The page header includes the CAGE logo and navigation links: SEARCH & INQUIRY, REQUEST | UPDATE, NEWS, FORMS, RESOURCES, ABOUT, CONTACT US. The main content area features a search bar with the number 534724781 entered. A magnifying glass icon is positioned above the search bar. Below the search bar is an "Advanced" search form with fields for Legal Name, Contact Phone, State/Province, and Postal Code. A "SEARCH" button is located to the right of the search bar. Two yellow callouts are present: callout 3 points to the search bar with the text "Search by NCAE or DUNS Number." and callout 4 points to the "SEARCH" button with the text "Click Search". The footer contains links for HOME, CAGE SEARCH & INQUIRY, REQUEST | UPDATE, NEWS AND EVENTS, FORMS, RESOURCES, TERMS OF USE, ABOUT, CAGE, DUNS, SAM, Ownership Of Offeror, CONTACT US, CAGE, Commercial And Government Entity Program, 1.877.352.2255, and Customer Service. The Windows taskbar at the bottom shows various open applications and the system clock indicating 10:41 AM on 9/23/2016.

# 3<sup>rd</sup> step

## Validate Information in CSI

The screenshot shows the CAGE (Commercial and Government Entity) Program search results page. The search criteria entered are CAGE or DUNS: 534724781. The search results table is circled in yellow, and a yellow arrow points from the 'Details' link to a yellow circle containing the number 5. Below this is a yellow button with the text 'Select "Details" to display CAGE information'.

CAGE	DUNS	Legal Business Name	State/Prov.	Zip/Postal	Details
SHC61	534724781	AL FAJR AL JADID CO WLL	KUWAIT	70651	<a href="#">Details</a>

Results Returned: 1

5

Select "Details" to display CAGE information

# 3<sup>rd</sup> step

## Validate Information in CSI

**CAGE**  
COMMERCIAL AND GOVERNMENT ENTITY PROGRAM

SEARCH & INQUIRY | REQUEST | UPDATE | NEWS | FORMS | RESOURCES | ABOUT | CONTACT US

### Details

SHC61 AL FAJR AL JADID CO WLL

CAGE Information		Contact Information	
CAGE	SHC61	POC	KAED HATIMALI BOHRA
DUNS	534724781	Corporate URL	HTTP://WWW.FAJRALJADID.COM
Status	Active	Phone	0096524825488
Type	Non-Manufacturer	Fax	0096524845184
Established	01/06/2010	Address	STREET 18, SHUWAIKH ELECTRICAL MARKE SHUWAIKH INDUSTRIAL AREA 2
CAGE Update Date	09/06/2016	P.O. Box	PO BOX 42084
CAGE Expiration		City	KUWAIT
SAM Expiration	01/06/2011	County	
		State/Province	KUWAIT
		Country	KUWAIT
		Zip/Postal	70651

**Ownership of Offeror Information**

Highest Level Owner	Information not Available	List of Offerors (0)	Information not Available
Immediate Level Owner	Information not Available		

**Additional Information**

CAO-ADP	
Parent CAGE	

The entity/organization's Legal Business Name and Physical Address must match exactly with NSPA, CSI, D&B and SAM.

# 4<sup>th</sup> step

## Request DUNS Number

Request a DUNS number for free by visiting D&B at <http://fedgov.dnb.com/webform>

- a. Register with Dun & Bradstreet (D&B) to obtain the Data Universal Numbering System (DUNS) Number by accessing the webform at <http://fedgov.dnb.com/webform>
- b. Ensure the entity's Legal Business Name and Physical Address match exactly with what was registered for the NCAGE Code by logging into the NSPA web portal and using the search option
- c. You will receive an email from D&B with your DUNS number. After 48 hours you can proceed with your SAM registration process.

It takes 1-2 business days to obtain a DUNS

# 4th step Request DUNS Number

The screenshot shows a web browser window displaying the D&B DUNS Request Service homepage. The browser's address bar shows the URL <http://fedgov.dnb.com/webform/displayHomePage.do>. The page features a yellow header with the D&B logo and the slogan "Decide with Confidence". A blue sidebar on the left contains navigation links such as "About the D&B D-U-N-S Number", "Frequently Asked Questions (FAQ)", "D&B, CCR, Grants Contacts", "D&B's Privacy and Data Policy", and "Accessibility". The main content area is titled "Welcome to the D&B D-U-N-S Request Service for US Federal Government Contractors and Grantees" and provides information about the D-U-N-S Number. A callout box labeled "1" points to the browser's address bar. A callout box labeled "2" points to a link that says "Click here to request your D-U-N-S Number via the Web." Below the main content area, a yellow footer contains a warning about spam-blockers and a large button that says "Click to request your DUNS number". The Windows taskbar at the bottom shows various open applications, including Internet Explorer, and the system clock indicates the time is 11:57 AM on 3/9/2015.

1

<http://fedgov.dnb.com/webform>

Welcome to the D&B D-U-N-S Request Service  
for US Federal Government Contractors and Grantees

Dun & Bradstreet (D&B) provides a D-U-N-S Number, a unique nine digit identification number, for each physical location of your business.

D-U-N-S Number assignment is FREE for all businesses required to register with the US Federal government for contracts or grants.

[Click here to request your D-U-N-S Number via the Web.](#) If one does not exist for your business location, it can be created within 1 business day.

For technical difficulties, contact [govt@dnb.com](mailto:govt@dnb.com)

2

Click to request your DUNS number

# 4<sup>th</sup> step Request DUNS Number

CCR Webform : Search - Windows Internet Explorer  
http://fedgov.dnb.com/webform/pages/CCRSearch.jsp

Company Lookup > Search >

### Search

Please select the country or territory where your company is physically located, then click continue. If you do not see your country or territory listed, please contact [govt@dnb.com](mailto:govt@dnb.com)

KUWAIT Continue

3 4

Select Country "Kuwait"

Click "Continue"

Done Internet | Protected Mode: On 125% 11:58 AM 3/9/2015

# 4<sup>th</sup> step Request DUNS Number

CCR Webform : Search - Windows Internet Explorer  
http://fedgov.dnb.com/webform/searchAction.do

Company Lookup > Search >

### Search

Fill out the following information to search for your company.

Please select the country or territory where your company is physically located, then click continue. If you do not see your country or territory listed, please contact [govt@dnb.com](mailto:govt@dnb.com)

KUWAIT

Enter the following information for companies located in KUWAIT and click the submit button to execute your search.

Business Name: test  
Street: \_\_\_\_\_  
City: \_\_\_\_\_  
Phone: \_\_\_\_\_

 [Click here for a new image](#)  
[Click here to listen to audio](#)  
[Click here to download wav file](#)

Enter the verification code shown:   
This is to prevent automated registrations

5

Fill in requested details and then Submit.

Internet | Protected Mode: On 125% 12:00 PM 3/9/2015

# 4<sup>th</sup> step Request DUNS Number

CCR Webform : Results - Windows Internet Explorer  
http://fedgov.dnb.com/webform/searchAction.do

CCR Webform : Results

**D&B DUNS Numbers™**  
for US Government  
Contractors & Grantees

Decide with Confidence

Company Lookup > Search > Results >

### Search Results

Your search returned the following results...\*\*

OPERATIONAL TEST COMMAND FOAT KUWAIT CITY, KU	<a href="#">Request Your Existing D-U-N-S Number</a> <a href="#">View/Modify Your Information</a>
TESTA GEN. TRADING & CONT. CO. W.L.L. P.O. Box 7288 HAWALLI KU	<a href="#">Request Your Existing D-U-N-S Number</a> <a href="#">View/Modify Your Information</a>
AL FOUZ TOAST Ner To Gic Paints Shuwaikh Industrial Area Shuwaikh, KU	<a href="#">Request Your Existing D-U-N-S Number</a> <a href="#">View/Modify Your Information</a>

If you do not see your company listed above...

[Search Again](#) (try a former business address) OR

[Request a New D-U-N-S Number](#)

6

If you have NO previous DUNS number, you can proceed to request a New D-U-N-S Number

\*\* If you are not able to distinguish your location from the search results please contact D&B at gov@dnb.com

If you have technical difficulties, please contact gov@dnb.com

© Dun & Bradstreet Inc., 2009

Internet | Protected Mode: On 125% 12:01 PM 3/9/2015

# 4<sup>th</sup> step Request DUNS Number

CCR Webform : New Duns Number Request. - Windows Internet Explorer

http://fedgov.dnb.com/webform/newReq.do?hdncompanynumber=-1&browser=&hdnCompanyName=&hdnAddress=&hdnCity=&hdnState=&hdnZip=&hdnCountry=&hdnDuns=&hdnTradeStyleNa

CCR Webform : New Duns Number R...

**Decide with Confidence**

**D-U-N-S Number Request >** Search > **Enter Your Company Information >**

## Request for New D-U-N-S Number

Any affiliated companies at the same address, will not be affected. If there are affiliated companies at the same address, please specify in the Notes section.

Complete the information below to obtain a new D-U-N-S Number for your company's physical location.

**Note: All fields are required unless otherwise indicated.**

Company Name	
? Legal Name	test
? Legal Structure	Select one
? Tradestyle Name 1 (optional)	
Tradestyle Name 2	
Tradestyle Name 3	
? Phone Number of Business	
Physical Address	
? Street	
? City	
? State	
? Zip Code + 4/Postal Code	
Country	KUWAIT
Mailing Address (optional) <input type="checkbox"/> Same as Physical Address	
? Street/ P.O. Box	
City	

7

Fill all fields required and then select Submit. Ensure the entity's Legal Business Name and Physical Address match exactly with what was registered for the NCAGE Code

Done

Internet | Protected Mode: On

125%

12:02 PM 3/9/2015

# 5<sup>th</sup> step

## Register with the System for Award Management (SAM)

### Register with the System for Award Management (SAM)

- a. You **must** have the NCAGE Code and the DUNS Number before registering in SAM.
- b. Register in SAM once the D&B number and NCAGE Code are granted.
- c. Follow the quick guide for international registrations at SAM.gov for registrants who are physically located outside the U.S. and its territories
- d. Foreign vendors are **NOT** required to enter tax identification numbers (TIN) in SAM. If TIN information is entered, the SAM Registration will be sent to the Internal Revenue Service (IRS) for validation (which will increase the processing time) before being forwarded on to the CAGE Program Office for final validation.
- e. If you are a non-U.S. registrant doing business outside the U.S. then Electronic Funds Transfer (EFT) information is not mandatory.
- f. If the registration is successfully processed in SAM with the NCAGE Code and submitted to CAGE Program Office for final validation, an email confirmation will be sent to the authorized administrator user(s) of the entity/organization and the SAM status will be updated to “Pending CAGE Validation”.
- g. If the registration is not complete at SAM, the status will indicate “Draft” until the Core Data is complete. “Work in Progress” indicates that Core Data is not complete.
- h. Continue to complete the registration until you have submitted your SAM registration.
- i. Log into SAM and check the SAM Status Tracker to check the status. The checkmarks on the left navigation menu or error messages at the top of the page will indicate what is required to complete the registration process.

# 5<sup>th</sup> step

## Register with the System for Award Management (SAM)

### ▣ Information opt-out

- ❖ You may opt-out from displaying your entity information on the SAM Public search page. This may result in a reduction of federal government business opportunities.
- ❖ On the screen Information Opt-out please select one of the following:
  - I authorize my entity's information to be displayed in SAM's Public Search
  - I do not authorize information to be displayed in SAM's Public Search
- ❖ Then click on Save and Continue

# 5<sup>th</sup> step

## Register with the System for Award Management (SAM)

### Steps For Registering Your Entity in SAM

1. Go to [www.sam.gov](http://www.sam.gov)
2. Create a Individual Account and Login
3. Click “Register New Entity” under “Entity Registrations” on your “My SAM” page
4. Select your type of Entity
5. Select “Yes” to “Do you wish to bid on contracts?”
6. Complete (A, B, C and D):
  - A. “Core Data”
  - B. “Assertions”
  - C. “Representations and Certifications”
  - D. “Points of Contact”

# 5<sup>th</sup> step

## Register with the System for Award Management (SAM)

### A. Complete “Core Data”

- Validate your DUNS information
- Enter Business Information (TIN, etc.) **(NOT applicable to entities located outside the United States. If you are a foreign entity that does not pay taxes in the U.S., do not enter a number in the TIN field during registration.)**
- Foreign registrants must enter their NCAGE code.
- Enter General Information (business types, organization structure, etc.)
- Financial Information (Electronic Funds Transfer (EFT )Information). **(If you are a non-U.S. registrant doing business outside the U.S. then Electronic Funds Transfer (EFT) information is not mandatory)**
- Executive Compensation
- Proceedings Details

### B. Complete “Assertions”

- Goods and Services (NAICS, PSC, etc.)
- Size Metrics
- EDI Information
- Disaster Relief Information

### C. Complete “Representations and Certifications”

- FAR Responses
- Architect-Engineer Responses
- DFARS Responses

### D. Complete “Points of Contact”

# 5<sup>th</sup> step Register with the System for Award Management (SAM)

## Create a Individual Account and Login

1

www.sam.gov

2

Click Create Account

System for Award Management

General Services Administration [US] https://www.sam.gov/portal/SAM/#11

View assistance for SAM.gov

USER NAME  PASSWORD  LOG IN

Forgot Username? Forgot Password? Create an Account

HOME SEARCH RECORDS DATA ACCESS GENERAL INFO HELP

CREATE USER ACCOUNT

Your CCR username will not work in SAM. You will need a new SAM User Account to register or update your entity records. You will also need to create a SAM User Account if you are a government official and need to create Exclusions or search for FOUO information.

Create User Account

REGISTER/UPDATE ENTITY

You can register your Entity (business, individual, or government agency) to do business with the Federal Government. If you are interested in registering or updating your Entity, you must first create a user account.

Register/Update Entity

New! Use the SAM Status Tracker to: Check Status

SEARCH RECORDS

All entity records from CCR/ FedReg and ORCA and exclusion records from EPLS, active or expired, were moved to SAM. You can search these records and new ones created in SAM. If you are a government user logged in with your SAM user account, you will automatically have access to FOUO information.

Search Records

WHAT IS SAM? Need Help?

The System for Award Management (SAM) is the Official U.S. Government system that consolidated the capabilities of CCR/ FedReg, ORCA, and EPLS. There is NO fee to register for this site. Entities may register at no cost directly from this page. User guides and webinars are available under the Help tab.

NEWS AND ANNOUNCEMENTS

Try out SAM's new RESTful API for public registration data! [Learn more.](#)

Update: The SAM.gov January 16, 2015 release notes are posted. Remember, you can find release notes for all SAM.gov software releases at SAM.gov > General Info > News > Release Notes.

USER GUIDES/HELPFUL HINTS

Additional information, such as a full User Guide, Quick Start Guides, Helpful Hints, and Webinars are available on the HELP tab.

Service Desk  
URL: <http://www.FSD.gov>  
[Learn](#) how to check your SAM entity registration status.

ATTENTION EXTRACT AND WEB SERVICE USERS

Support for the legacy-formatted extracts and web services in SAM ended on October 31st, 2014. Federal systems using SAM data must convert to the SAM-formatted extracts and web services. If you see "You do not have access to this extract" you need to submit a Data Access Request for the appropriate role by logging in with the account that needs the role. Go to "Data Access" then click on either "System Data Access Request" or "Individual Data Access Request" (depending on your user account type) and follow the prompts to submit the request.

SAM | System for Award Management 1.0

IBM v1.P.24.20150116-1831  
WWW1

Note to all Users: This is a Federal Government computer system. Use of this system constitutes consent to monitoring at all times.

GSA USA.gov

12:44 PM 3/9/2015

# 5<sup>th</sup> step Register with the System for Award Management (SAM)

The screenshot shows the SAM website's 'Create an Account' page. At the top, there is a navigation bar with 'HOME', 'SEARCH RECORDS', 'DATA ACCESS', 'GENERAL INFO', and 'HELP'. Below this is a 'Create an Account' section with a 'Choose Account Type' heading. Two columns are visible: 'Individual Account Details' and 'System Account Details'. The 'Individual Account Details' column has a 'Create an Account' button circled in yellow. A yellow arrow points from this button to a yellow circle containing the number '3'. Below the '3' is a yellow button labeled 'Click Create an Account'. The 'System Account Details' column has a 'Create System Account' button. The page footer includes 'SAM | System for Award Management 1.0', 'IBM v1.P.24.20150116-1831 WWW1', and logos for GSA and USA.gov. The browser's address bar shows the URL: https://www.sam.gov/portal/SAM/?portal:componentId=42c3b948-a1c0-4457-854d-4f9cfb0443c&interactionstate=JBPNs\_r00ABXcvABBfanNmQnJpZGdVmlld0kAAAAQAOL2pzZi9sb2dpbi5qc3AA819FRU9GX18. The Windows taskbar at the bottom shows various open applications like 'CCR...', 'Syste...', 'Micros...', 'Ariba...', 'CCR...', 'load - ...', 'Subpa...', 'Sent It...', 'Cell P...', 'pi20...', 'SAM-F...', 'SAM-...', and 'Presen...'.

# 5<sup>th</sup> step Register with the System for Award Management (SAM)

The screenshot shows a web browser window displaying the SAM registration form. The browser address bar shows the URL: [https://www.sam.gov/portal/SAM/?navigationalstate=JBPNs\\_r00ABXdcACJqYZheC5mYWNlcy5wb3J0bGV0YnJpZGdlLlNUQVRFX0lEAAAAAQApdmlldzo2NzQ3ZWl5ZC0yYzYxLTQ0YTctOGRIYS01N2JlNGYxYTNjZDIA](https://www.sam.gov/portal/SAM/?navigationalstate=JBPNs_r00ABXdcACJqYZheC5mYWNlcy5wb3J0bGV0YnJpZGdlLlNUQVRFX0lEAAAAAQApdmlldzo2NzQ3ZWl5ZC0yYzYxLTQ0YTctOGRIYS01N2JlNGYxYTNjZDIA). The page title is "View assistance for Your Account Information - Create your individual user account in SAM by entering the following information." The form is titled "Individual" and "Create your individual user account in SAM by entering the following information." The form fields include: First Name, Last Name, Email Address, Confirm Email Address, Phone, Primary Communication (Phone or Email), Additional Comments, Country (set to KUWAIT), Username, Password, Confirm Password, Security Question 1, Security Answer 1, Security Question 2, Security Answer 2, Security Question 3, and Security Answer 3. A "NEXT" button is at the bottom right. Annotations include a yellow box with "4" pointing to the form fields, a yellow box with "5" pointing to the "NEXT" button, and purple boxes with instructions: "Select the country in which you are residing" (pointing to the Country dropdown), "Once created, username can't be changed in SAM" (pointing to the Username field), and "Click Next" (pointing to the "NEXT" button). A yellow box on the left says "Start entering all required fields, and then click next".

Start entering all required fields, and then click next

4

Country: KUWAIT

Select the country in which you are residing

Once created, username can't be changed in SAM

Click Next

5

NEXT

# 5<sup>th</sup> step Register with the System for Award Management (SAM)

This page means that you have successfully created your user account and that you must now validate it by responding to the validation email.

The screenshot shows a web browser window displaying the SAM (System for Award Management) website. The URL in the address bar is <https://www.sam.gov/portal/public/SAM/?portalcomponent>. The page features a navigation menu with options: HOME, SEARCH RECORDS, DATA ACCESS, GENERAL INFO, and HELP. The main content area is titled "Create Account: Personal" and "Account Created - Confirmation". A confirmation message states: "Congratulations -- Your SAM account has been created! But, you are not done. We just sent you an email to the email address you gave us so you can confirm your account creation. In the email, there is a link that you must click within next 48 hours to activate your account. For now, click on DONE to go back to the SAM Home page." Below the message are buttons for PRINT, SAVE, and DONE. A yellow callout box with the number "6" and the text "Select Done" points to the DONE button. The footer includes the SAM logo, version information (SAM | System for Award Management 1.0), IBM contact information (IBM v1.821.20130326-0005 WWW1), and logos for GSA and USA.gov.

# 5<sup>th</sup> step Register with the System for Award Management (SAM)

The validation email comes from [notification@sam.gov](mailto:notification@sam.gov). The activation link is the first link in the email and may not be an active link. If it is not active you may copy and paste the address in your browser address line.

The screenshot shows a Gmail inbox with a welcome email from [notification@sam.gov](mailto:notification@sam.gov). The email text is as follows:

Welcome to the U.S. Federal Government's System for Award Management (SAM)

**notification@sam.gov**  
to me

*This email was sent by an automated administrator. Please do not reply to this message.*

Thank you for registering in the U.S. federal government's System for Award Management (SAM).

Your Username is: ames4591

Please note that this is only a confirmation of your Username. You must click on the link below, within 48 hours of receipt of this message, to verify your email address and complete the registration process. <https://www.sam.gov/portal/public/SAM?activationCode=iL5pPwK4bhVFGND>

You may also copy and paste the URL into your browser address line to go directly to the web page.

Please note that if this is your first login attempt, the system will default to the Migrate Legacy Account page where you will be prompted to indicate whether or not you wish to transfer your role(s) held in the legacy federal government systems (CCR.gov, FedReg.gov, ORCA.gov, and EPLS.gov) to your new SAM account.

IMPORTANT: If you do not have roles to migrate from a legacy system and you would like a new role assigned to your account, you will need to request that a role be assigned by your Administrator in order to have access to desired system functionality.

For assistance, please contact the Federal Service Desk at [www.fsd.gov](http://www.fsd.gov) or by telephone at 866-606-8220 (toll free) or at 334-206-7828 (internationally).

Thank you,  
The System for Award Management  
<https://www.sam.gov/portal/public>

A yellow circle highlights the activation link in the email. A yellow callout box with the number 7 points to the link. A yellow button at the bottom says "Select the activation link".

# 5<sup>th</sup> step Register with the System for Award Management (SAM)

The link will take you to SAM site. Now you can log in to activate your user account.

The screenshot shows the SAM website's login page. At the top, there is a navigation bar with links for HOME, SEARCH RECORDS, DATA ACCESS, GENERAL INFO, and HELP. Below this is a 'Login' section with the heading 'Enter Username and Password'. The login form contains two input fields: 'Username' and 'Password'. Below each field are links for 'Forgot Username?' and 'Forgot Password?'. A 'Login' button is positioned at the bottom of the form. A yellow oval highlights the entire login form area, with an arrow pointing to a yellow callout box on the right that contains the number '8' and the text 'Enter your Username and Password'. The page footer includes the SAM logo, version information (1.0), IBM system ID (71.821.20130326-0005), WW1, and logos for GSA and USA.gov. A disclaimer note is also present: 'Note to all Users: This is a Federal Government computer system. Use of this system constitutes consent to monitoring at all times.'

# 5<sup>th</sup> step Register with the System for Award Management (SAM)

Once you select done on this page your account will be activated and you will be logged in to the SAM system.

The screenshot shows a web browser window displaying the SAM (System for Award Management) user dashboard. The browser's address bar shows the URL <https://www.sam.gov/portal/public/SAM?portal:componentid>. The page features the SAM logo and a navigation menu with options: HOME, SEARCH RECORDS, DATA ACCESS, GENERAL INFO, and HELP. A user profile bar displays the name "Mr. Amy Fuller". Below this, a confirmation message states: "Account Activated - Confirmation". The message includes a timestamp "Wed Apr 03 14:33:03 EDT 2013" and a thank-you note: "Thank you for activating your SAM account! You will be taken to the User Dashboard page. Once on the User Dashboard, you will have the option to migrate an account from a legacy system. Use the Done button to continue." At the bottom of the message box, there are three buttons: "PRINT", "SAVE", and "DONE". A yellow callout box with the number "9" and an arrow points to the "DONE" button, with the text "Select Done." next to it. The footer of the page contains the text "SAM | System for Award Management 1.0", "IBM V1-021-20130326-0005 WWW1", and logos for GSA and USA.gov. The Windows taskbar at the bottom shows the time as 2:33 PM.

# 5<sup>th</sup> step Register with the System for Award Management (SAM)

Register/Update Entity.

The screenshot shows the SAM.gov website interface. The browser address bar displays <https://www.sam.gov/portal/public/SAM?portal:componentid>. The page header includes the SAM logo and the text "SYSTEM FOR AWARD MANAGEMENT". A navigation bar contains links for "MY SAM", "SEARCH RECORDS", "DATA ACCESS", "GENERAL INFO", and "HELP". A search bar is located to the right of these links. The main content area features a "Welcome, Amy Fuller" message with a "LOGOUT" button. Below the welcome message is a banner asking "Would you like to migrate a legacy system account?" with "YES" and "HIDE MESSAGE" buttons. The "MY SAM" sidebar menu is visible, with "Register/Update Entity" highlighted in a yellow circle. A yellow callout box with the text "Select Register" points to this option. The main content area also contains a "Notice for all registered users" regarding NAICS codes and a list of dates: October 1, 2012; October 24, 2012; and January 7, 2013. The Windows taskbar at the bottom shows the system clock at 2:37 PM.

# 5<sup>th</sup> step Register with the System for Award Management (SAM)

Page will display information required to complete your registration

System for Award Management - Windows Internet Explorer

https://www.sam.gov/portal/public/SAM/?portal:componentId=fd9581f5-fdb9-4668-9782-f053c5cf0d35&p

General Services Administration [US]

System for Award Management

File Edit View Favorites Tools Help

Page Safety Tools

Points of Contact

Submit Certification

BACK TO USER DASHBOARD

Entity number, general information, financial information, and details about any proceedings in which the entity may currently be involved. Core Data is mandatory for all registration types.

**Assertions** - Documents self-assertions from each entity. Assertions includes, but is not limited to, data about the types of goods and services the entity provides, the entity size, optional Electronic Data Interchange (EDI), and disaster relief data.

**Representations and Certifications** - Documents an entity's representations and certifications related to their small business status, responses to commonly used Federal Acquisition Regulation (FAR) and Defense Federal Acquisition Regulation Supplement (DFARS) provisions/clauses, and Architect-Engineer Responses (SF330 Part II).

**Points of Contact (POC)** - The entity will be asked to provide contact information for any mandatory POC based on the information they provided during the registration process. POC types include, but are not limited to, accounts receivable, electronic business, and government business. POC information is mandatory for all registration types.

Before you start, please be sure you have gathered the following information:

- Your Data Universal Numbering System (DUNS) Number from Dun and Bradstreet and the name and address associated with that DUNS
- Your Taxpayer Identification Number and the name associated with that TIN (from your W-2)
- Your Contractor and Government Entity (CAGE) Code, if you already have one (if you don't, one will be assigned to you during registration)
- Your Electronic Funds Transfer information such as your ABA Routing Number and your account number

You will be unable to submit your registration online unless all the mandatory information is provided.

\* **Note:** An entity within the SAM system includes prime contractors, organizations or individuals applying for assistance awards, those receiving loans, sole proprietors, corporations, partnerships, and any Federal government agencies desiring to do business with the government.

Entity Administrators and/or Entity Registration Representatives are responsible for ensuring the accuracy of an entity registration in SAM. An entity registration must be renewed every 365 days in order to remain active and will expire if it is not updated in a timely manner. Expired registrations may affect the ability to do business with the Federal government.

Select Start Registration

11

START REGISTRATION

SAM | System for Award Management

IBM 1.863.20130412-1616  
WWW1

GSA USA.gov

Note to all Users: This is a Federal Government computer system. Use of this system constitutes consent to monitoring at all times.

75%

Start System for Award Management Microsoft PowerPoint ... Desktop 8:59 AM 4/23/2013

# 5<sup>th</sup> step Register with the System for Award Management (SAM)

Purpose of Registration.

The System will guide you based on your answers

The screenshot shows the SAM (System for Award Management) website in a Windows Internet Explorer browser. The browser's address bar shows the URL: <https://sam.gov/portal/public/SAM/portal.componentId=25fd25>. The user is identified as "Amy Fuller" and has a "LOGOUT" button. The main navigation bar includes "MY SAM", "SEARCH RECORDS", "DATA ACCESS", "GENERAL INFO", and "HELP". A search bar is also present.

The "Register Entity" section is active, with a sub-section titled "Determine Purpose of Registration". The page description states: "The system will guide you through the entity registration process based on the answers you provide below."

The registration form includes the following questions and options:

- What type of entity are you? \*  
Please select a value  
Please select a value  
Business or Organization  
US State Government  
US Local Government  
Tribal Government  
Foreign Government
- Do you wish to bid on contracts?  
Not Applicable
- Do you want to be eligible for grants and other federal assistance?  
Not Applicable

A "BACK TO USER DASHBOARD" button is located at the bottom left of the registration form. The Windows taskbar at the bottom shows the system time as 3:51 PM on 5/1/2013.