

U.S. Small Business Administration

SAM Registration in 3 Easy Steps:

- 1. Obtain a FREE DUNS number
- 2. Complete SAM Registration Obtain your CAGE Code
- 3. Send in your Notarized Letter of Authorized Account Users within 60 days of registering



 Obtain a FREE DUNS number from Duns and Bradstreet by going to <u>http://fedgov.dnb.com/webform</u>. Your business must have a DUNS number to register in SAM.

You will need <u>all</u> of the information listed below to obtain a DUNS number:

- Name of organization
- Organization address
- Name of the chief executive officer (CEO) or organization owner
- Legal structure of the organization (e.g., corporation, partnership, proprietorship)
- Year the organization started
- Primary type of business
- Total number of employees (full and part-time)



2. Ensure you are on sam.gov – and no other page!

	View assistanc	e for SAM.gov			
SAM ,GOV	10	A NEW WAY TO SI a SAM account, use y	GN IN - If you alrea our SAM email for l	dy have ogin.gov.	Log In gin.gov FAQs
HOME SEARCH RECORDS DATA AC	CESS CHECK STATUS	ABOUT HELP			
ALERT: SAM.gov will be down for scheduled main	atenance Saturday, 02/13/2021 fro	m 8:00 AM to 1:00 PM.			
The System for Award Management (SAM this site for FREE to: • Register to do business with the U.S. go • Update or renew your entity registratio • Check status of an entity registration • Search for entity registration and exclusion	I) is an official website of wernment n sion records	the U.S. governmen	ıt. There is no cost	to use SAM. Y	ou can use
	Getting	Started			
Create A User Account	Register I	Entity	S	earch Records	
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Start by creating a SAM user account.	After creating your SAM user a to do business with the	account, log in to register U.S. government.	Do a public sear record	ch for existing entit s or exclusion recor	y registration ds.
			Federal users can l	og in to see addition	al information.
GSA IEM-P-20210115-1535 WWW6			Search Records Data Access Check Status About Help	Disclaimers Accessibility Privacy Policy	FAPIIS.gov GSA.gov/IAE GSA.gov USA.gov
This is a U.S. General Services Administration Fed performing unauthorized activities are subject to d	eral Government computer system that is lisciplinary action including criminal pros	"FOR OFFICIAL USE ONLY." ecution.	This system is subject to mor	nitoring. Individuals fo	md



U.S. Small Business Administration

3. Gather all of the information you will need for registration including:

- DUNS Number
- Banking Information
- Taxpayer Identification Number
- Sales per year average for the past 3 years OR in the case of certain financial institutions, your Total Assets
- Total number of staff (full & part time) for the past 12 months
- Point of Contact information including phone numbers, addresses, and emails. If your business has a lot of turn-over, you might consider having a second or even third person who has access to the SAM record and is authorized to make changes.



4. Identify your NAICS Codes:

- NAICS define businesses based on the activities in which they are primarily engaged and are used as the basis for size standards.
- Your business may have multiple NAICS codes.
- You can visit the <u>US Census Bureau NAICS</u> <u>website</u> (census.gov) to identify them.
- You may enter multiple NAICS in SAM but the system will ask you to identify your primary industry code.



5. Review the SBA Size Standards Table to identify what information to use as your "sales" information:

		Size standards in	Size standards in
		millions of	number of
	NAICE II S. industry title	dollars	number of
NAICS COUES	NAICS 0.3. Industry title	Con million in	emptoyees
522110	Commercial Banking ⁸	3000 million m	
		\$600 million in	
522120	Savings Institutions ⁸	assets ⁸	
		\$600 million in	
522130	Credit Unions ^a	assets ⁸	
522100	Other Descriters Conditions disting	\$600 million in	
522190	Other Depository Credit Intermediation-	assets ⁸	
522210	Credit Card Issuing	\$600 million in	
522210	Credit Card Issuing	assets ⁸	
522220	Sales Financing	\$41.5	
522291	Consumer Lending	\$41.5	
522292	Real Estate Credit	\$41.5	
522293	International Trade Financing	\$41.5	
522294	Secondary Market Financing	\$41.5	
E22200	All Other Nondepository Credit	\$41.5	
522298	Intermediation		
522310	Mortgage and Nonmortgage Loan Brokers	\$8.0	
522220	Financial Transactions Processing, Reserve,	641 E	
522520	and Clearinghouse Activities	\$41.5	
F33300	Other Activities Related to Credit	¢22.0	
522590	Intermediation	\$22.0	
523110	Investment Banking and Securities Dealing	\$41.5	
523120	Securities Brokerage	\$41.5	
523130	Commodity Contracts Dealing	\$41.5	
523140	Commodity Contracts Brokerage	\$41.5	
523210	Securities and Commodity Exchanges	\$41.5	

Sector 52 - Finance and Insurance

- The full SBA Size Standards Table can be found at sba.gov
- The Finance Industry NAICS Codes are found in Sector 52 which starts on Page 31.



6. Starting the Registration:

When you're ready to start, scroll down and select "Create User Account" to create an account with Login.gov.

- Each individual authorized to make changes to your account must have their own Login.gov account.
- You'll need a working phone number (mobile or landline) or an authentication app (installed on your mobile device or computer) to receive the single-use security code.
- Going forward, every time you log into SAM, you'll go to the Login.gov sign-in page and enter your email address, password, and single-use security code.
- You can tell login.gov to remember your browser to store the security code for 30 days.



7. Return to www.SAM.gov and select Entity Registrations > Register New Entity.



• Select your type of Entity and start working through the registration screens.

*If your company already has a SAM record, it will automatically show up when you enter your DUNS Number. At that point, you do NOT have to register a new entity and can simply "claim" the current record that populates and update it.



8. Complete each page in sequence and then click "Save and Continue" at the bottom of the page BEFORE you continue to the next page.

SAM records are broken into 4 key sections in this order – Core Data, Assertions, Reps & Certs, and Points of Contact (POC):

Remember, complete the registration in order:

- Do NOT jump around!
- Make sure to save EVERY page.
- Avoid using punctuations such as periods, commas and hyphens when entering info.
- See <u>GSA's Quick Start Guide for Contract Registration</u> for additional tips.





9. Make sure to select "Submit" after your final review.

- You will get a "Registration Submitted" confirmation message on the screen. If you do not see this message, you have not submitted your registration.
- Allow up to 12-15 business days after you submit before your registration is active in SAM. This is typically the **maximum** amount of time a SAM registration will take to become active. It's usually shorter.
- You will receive an email from SAM.gov when your registration is active that will contain your Commercial & Government Entity or "CAGE" Code. Your CAGE Code is your <u>unique federal identifier</u> for your business. Keep track of it.



SAM General Search

1. Go to sam.gov

	View assistance for SAM.gov		
SAM.GO	A NEW WAY TO S a SAM account, use y	IGN IN - If you already have rour SAM email for login.gov.	Log In in.gov FAQs
HOME SEARCH RECORDS DATA A	ACCESS CHECK STATUS ABOUT HELP		
ALERT: SAM.gov will be down for scheduled ma	aintenance Saturday, 02/13/2021 from 8:00 AM to 1:00 PM.		
The System for Award Management (SA this site for FREE to: Register to do business with the U.S. (Update or renew your entity registration Check status of an entity registration Search for entity registration and excl	LM) is an official website of the U.S. governmen government ion lusion records	nt. There is no cost to use SAM. Yo	ou can use
	Getting Started		
Create A User Account	Register Entity	Search Records	
Å	+		
Start by creating a SAM user account.	After creating your SAM user account, log in to register to do business with the U.S. government.	Do a public search for existing entity records or evolusion record	registration
		Federal users can log in to see additiona	al information.
GSA		Search Records Disclaimers Data Access Accessibility Check Status Privacy Policy About Help	FAPIIS.gov GSA.gov/IAE GSA.gov USA.gov



SAM General Search

2. Click "Search Records"





SAM General Search

3. Enter Search Parameters

	istance for SAM.gov
₩SAM ,GOV°	A NEW WAY TO SIGN IN - If you already have a SAM account, use your SAM email for login.gov. Login.gov FAQs
IOME SEARCH RECORDS DATA ACCESS CHECK STA	ATUS ABOUT HELP
ALEKT: SAM.gov will be down for scheduled maintenance Saturday, 02/13/2	2021 HOM 5100 AM 10 1100 FM.
jearch Tips to Get Started: Looking for entity registration records or entity exclusion records in SA CAGE Code. Use Advanced Search to structure your search using mu Are you a Federal government employee? Create a SAM user account w information and registrants who chose to opt out of the public search. Conducting small business-focused research? In addition to what is con (SBA) supplemental information about themselves. Use the <u>SBA's Dyna</u> Trying to find a contractor participating in the Disaster Response Regis provide debris removal, distribution of supplies, reconstruction, and ot Choose Quick Search or Advanced Search	M? Use Quick Search if you know an entity's Business Name, DUNS Number or ultiple categories and criteria. ith your government e-mail address and log into SAM before searching to see FOUO tlained in SAM, small businesses can provide the Small Business Administration <u>unic Small Business Search</u> to conduct further market research. itry? Use the Disaster Response Registry Search to locate contractors willing to her disaster or emergency relief services in the event of a national disaster.
QUICK SEARCH: Enter your specific search term (Example of search term includes the entity's name, etc	ADVANCED SEARCH: Use specific criteria in multiple categories to structure your search.
DUNS Number Search: Enter DUNS number ONLY CAGE Code Search: Enter CAGE code ONLY	ADVANCED SEARCH - EXCLUSION
	DISASTER RESPONSE REGISTRY SEARCH
SEARCH Need Help?	



SAM Advanced Search - Exclusion

1. From the "Search Records" section on SAM

	A NEW WAY TO SIGN IN - If you already have
JAM + GUV	a SAM account, use your SAM email for login.gov.
	Login.gov FAQs
E SEARCH RECORDS DATA ACCESS	CHECK STATUS ABOUT HELP
LERT: SAM.gov will be down for scheduled maintenance Sa	iaturday, 02/13/2021 from 8:00 AM to 1:00 PM.
ch Records	
ch Tips to Get Started: king for entity registration records or entity exclusion 2E Code. Use Advanced Search to structure your se you a Federal government employee? Create a SAM or runation and registrants who chose to opt out of the p ducting small business-focused research? In addition A) supplemental information about themselves. Use f ing to find a contractor participating in the Disaster F wide Advice removal distribution of sumples records	n records in SAM? Use Quick Search if you know an entity's Business Name, DUNS Number or earch using multiple categories and criteria. user account with your government e-mail address and log into SAM before searching to see FOUO public search. n to what is contained in SAM, small businesses can provide the Small Business Administration the <u>SBA's Dynamic Small Business Search</u> to conduct further market research. Response Registry? Use the Disaster Response Registry Search to locate contractors willing to truction and other disaster or generasney. Failed services in the award of a national disaster
ose Quick Search or Advanced Search	ADVANCED SEARCH:
Qerek Billiten.	Use specific criteria in multiple categories to structure your
Enter your specific search term	searcn.
(Example of search term includes the enti	ity's name, etc.) ADVANCED SEARCH - ENTITY
DUNS Number Search: Enter DUNS r	number ONLY ADVANCED SEARCH EXCLUSION
CAGE Code Search: Enter CAGE of	
	DISASTER RESPONSE REGISTRY SEARCH
SEARCH	Help?
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A	Data Access Distantiets TAT Itsgov Data Access Accessibility GSA.gov/IAE Check Status Privacy Policy GSA.gov About USA.gov
20210115-1535	Help
20210115-1535	Help



SAM Advanced Search - Exclusion

2. When clicking "Advanced Search" - Exclusion, the following dialogue box will appear:





SAM Advanced Search - Exclusion

3. You can now search for debarments, suspensions, and exclusion records.

HOME	SEARCH RE	CORDS I	DATA ACCI	ESS (CHECK STAT	TUS ABO	JT HELP		
AL	ERT: SAM.gov will be	e down for sche	duled mainter	ance Sat	urday, 02/13/20	21 from 8:00 A	M to 1:00 PM.		
dvar	nced Search	- Exclusi	on						
Structu descrit	ire your search for ses how you want t	exclusion re to search. The	cords in SAI e accordion	M using will expa	one of three a and to show ye	pproaches. Se ou the search	lect a radio b criteria. You c	utton corresponding to t an only use one approac	he category header that b ch at a time.
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	Zip Code								
	Country	All	~	l					
	Agency	All	~						
	Exclusion Status	Active	~	Selectin	g "All" displays l	both Active and	Inactive Exclusi	ons.	
1	Exclusion Type	All			~				
1	Exclusion Program	All	~						
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				search wi	th the criteria or	intained in one :	ecordion.		



SAM Assistance

Detailed user-guides, instructional videos, and other helpful information can be found under the "Help" Tab of sam.gov:

HOME SEARCH RECO	Login.gov FAQs							
IOME SEARCH RECO								
	RDS DATA ACCESS CHECK STATUS ABOUT HELP							
ALERT: SAM.gov will be do	vn for scheduled maintenance Saturday, 02/13/2021 from 8:00 AM to 1:00 FM.							
Help	User Guides							
-	Quick User Glindes							
Jser Guides	Helpful Hints for Entity Registrations							
Full User Guides	Description: Guidance for registrants on understanding your entity's registration status.							
Helpful Hints	VIEW Understanding Your Entity's Registration Status							
international Registrants	Description: Using SAM with the help of a Screen Reader.							
Demonstration Videos	DOWNLOAD PDF Best practice tips for using Screen Readers to navigate the SAM website							
Exclusions Information	Quick Start Guide for Service Contract Reporting (SCR)							
External Resources	Description: A chort reference entitle to help you report on your Service Contracts for the previous Government fiscal year							
	DOWNLOAD PDF							
	Quick Start Guides for Updating/Renewing Registrations							
	Description: A short reference guide to help you renew or update your registration that was previously in CCR (and in some cases							
	ORCA) and is now in SAM.							
	DOWNLOAD PDF							
	Description: A short reference guide to help foreign entities to register in SAM.							
	DOWNLOAD PDF							
	Quick Start Guides for Contract Registrations							
	Description: A short reference guide on what you must know to register your entity for contracts in SAM.							
	DOWNLOAD PDF							
	Description: A short reference guide to introduce the new CAGE Ownership of Offeror requirement.							
	DOWNLOAD PDF							
	Description: A short user guide to the Representations and Certifications questionnaire.							
	DOWNLOAD PDF							



U.S. Small Business Administration

SAM Assistance

For ALL tech related issues with SAM, you must contact the Federal Service Desk at:

- Website: <u>www.fsd.gov</u>
- U.S. Toll Free: 866-606-8220
 - Hours of Operation 8:00 a.m. to 8:00 p.m. (Eastern Time)





Contact the SBA

SBA Lender Hotline: 1-833-572-0502

Find your local SBA Field Office: <u>www.sba.gov/content/find-local-sba-office</u>



*For general SBA inquiries from the SBA Western PA Field Office, please email us at <u>wpainfo@sba.gov</u>

