



# The IAE Digest

*News and Program Updates from the Integrated Award Environment*

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## From the Deputy Assistant Commissioner

I want to extend a heartfelt thank you to my team at the Integrated Award Environment for accomplishing yet another milestone which will positively impact our system users. In the third quarter we transitioned our first system into the new environment, integrating the critical functionality of the Catalog of Federal Domestic Assistance (CFDA)—also known as assistance listings—into beta.SAM.gov.

Taking this step was a major achievement for us as my colleagues exceeded all requirements and expectations, demonstrating incredible resolve through their hard work. Their dedication to the mission continues to inspire me.

The end result is what I'm most proud of. Assistance listings users now have a better, more integrated way of finding the information they need. Soon to follow will be the rest of our remaining nine systems, until there is just one, singular system that will be called SAM.gov.

As we continue on this journey, I want to once again encourage you to remain involved. Keep giving us your feedback (directly through the feedback tool on beta.SAM.gov); keep volunteering to help us test the system; and keep letting us know what is working and (more importantly) what isn't.

If you haven't had the opportunity to search for assistance listings in beta.SAM.gov, give it a try. Let me know what you think!

Vicky Niblett

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## IAE Transitions CFDA to beta.SAM.gov

Readers of this space by now are well aware that the IAE has been working to bring you the new beta.SAM.gov. You may remember that back in October 2017, we soft-launched beta.SAM.gov as a test site and we've been focusing on your feedback. We've been working with many of you since the launch, and we thank all of you for your participation, suggestions, and comments.

With that solid background in place, on May 25 we transitioned the first of our 10 systems (what we call legacy systems) into beta.SAM.gov. Everything you used to do in the Catalog of Federal Domestic Assistance (CFDA.gov) can now be done in beta.SAM.gov. Anybody who goes to CFDA.gov will be redirected to beta.SAM.gov.

This marks a major step forward in our goal to migrate all of the IAE systems into beta.SAM.gov. Don't forget that once the current (or legacy) SAM.gov makes the transition, the "beta" moniker will drop off the new site, and it will forevermore be known simply as SAM.gov.

When we migrated over the functions of CFDA.gov, we made significant improvements. In the case of CFDA.gov, we:

- Improved the overall search engine and keyword search
- Enhanced the search summary, now provided directly in the search results
- Enabled advanced search filtering, enabling search by "active only" or by department/agency, among others
- Created a funded/not funded indicator that allows users to quickly identify funded listings
- Made it easier to read the financial information section with a bar graph and table
- Improved the history section
- Added links to respective opportunities on Grants.gov
- Revised roles and improved administrative functionality
- Made role migration significantly easier

Users can get information and guidance about the new assistance listings functions by visiting the Learning Center on beta.SAM.gov.

For more information about the overall evolution of beta.SAM.gov, stay tuned to IAE's Interact section or visit [GSA.gov/IAE](https://GSA.gov/IAE). You also can watch a short video about the CFDA.gov transition [here](#).

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## Chief Acquisition Officers Council Recognizes Two IAE Team Members

On June 13, Lesley Field, the deputy administrator for Federal Procurement Policy from the Office of Management and Budget, presented IAE's Michael Stephenson and Meredith "Memi" Whitehead each with a Certificate of Recognition from the Chief Acquisition Officers Council (CAOC).

Mike was recognized for superior collaboration in leading the federal-wide effort to modernize CFDA.gov and retiring the legacy system. As the product owner responsible for the new Assistance Listings functionality in beta.SAM.gov and the program manager for the legacy CFDA.gov, Mike's stellar support to the Federal assistance community over the past several years and dedication to the modernization culminated in CFDA.gov's retirement at the end of May 2018.

Memi was recognized for exceptional

leadership in reducing taxpayer costs and contractor burden while maintaining the integrity of the Federal awarding process related to her work with the legacy System for Award Management (SAM). As the lead program analyst for the current suite of IAE systems and the program manager for SAM, Memi's focus has been on improving the current SAM user experience, improving the quality of information available from SAM, and reducing the burden for those who wish to do business with the government.

The presentation during the CAOC meeting came as a complete surprise to Mike and Memi, both of whom assumed they were there to support an IAE update. "So many people were involved in achieving this milestone," Mike said. "This acknowledgement is really for the whole IAE team."

## Did You Know?

The New Learning Center in beta.SAM.gov

**Check out our Learning Center now available on beta.SAM.gov! The new Learning Center will include access to video tutorials, frequently asked questions (FAQs), quick start guides, and a glossary.**

One of the biggest updates is the ability to search for content in the Learning Center. Another addition is the Resources section, which is divided into four subsections (Assistance, Contracting, Wage Determinations, Partners). Each is designed to connect users to additional information.

Go to the Assistance subsection to learn about the grants lifecycle and find information about eligibility for different types of federal assistance. The Contracting subsection includes links to acquisition policy, regulation and compliance materials, and helpful sites for small businesses. The Wage Determinations subsection is available to find reference materials including labor standards and compliance requirements. Go to the Partners subsection for a list of related partners and links.

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## Recap of Industry Day 17

### IAE Stakeholder Forum Recap

Thanks to everyone who participated in the most recent IAE Stakeholder Forum program.

On June 12, the IAE hosted another online event in our ongoing series aimed at creating and increasing conversation and dialogue between stakeholders and the folks here who make the systems work.

The entire session was based on leaving the program open to the questions that participants sent in. While a few of the questions were about the transition, most revolved around SAM.gov and the entity registration process. One of the main topics of this event was the steps GSA is taking to address fraudulent activity in the System for Award Management (SAM). More than 125 attendees joined to hear IAE's Outreach and Stakeholder Engagement Director Nancy Goode

and Business Operations Director Memi Whitehead discuss how the activation process will change so a notarized letter is required after the activation of a registration.

Participants also heard how SAM.gov is increasing security by integrating with Login.gov to implement multi-factor authentication for registered SAM.gov users. As of June 29, when users go to SAM.gov and log in, they will be asked to create a Login.gov user account. They must know the email address associated with their current SAM.gov user account to automatically migrate their roles.

Goode and Whitehead explained that the IAE will post messages on SAM.gov along with the FSD website before the Login.gov transition takes place. The IAE also will engage in a wide range of public-facing messages to ensure stakeholders are ready for the switch.

If you missed the Industry Day program, you can view the [full presentation online](#). Stay tuned for an upcoming post about IAE's next Stakeholder Forum.

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## System Updates

### SAM

With each software release, we work to improve the System for Award Management (SAM) user experience, improve the quality of information available from SAM, and reduce the burden for those wishing to do business with the U.S. federal government. We do this through a combination of minor enhancements and fixing known issues. The following summarizes customer-facing changes that were made to the SAM application and database in the development window culminating in the build to production in the third quarter of Fiscal Year 2018:

#### Enhancements

- Strengthened protection for sensitive data in SAM.gov by implementing new sensitive data-masking logic in the entity registration record. This logic will be applied across the entity registration creation, update, view, and search processes, even for authorized users. The Taxpayer Identification Number (TIN), Marketing Partner Identification Number (MPIN), and Electronic Funds Transfer (EFT) fields will be partially masked upon selecting the Save and Continue button. Only the last four characters will continue to display for authorized users.
- Updated SAM Status Tracker text for new entity registrations in Submitted status to include a Pending Notarized Letter message so SAM Entity Administrators are aware that an action is required prior to activation.
- Expanded the business process requirement for an entity to submit an original, signed notarized letter in which an officer or other signatory authority designates the Entity

Administrator to include both new and existing entities renewing or updating their registration. If there is not a letter designating the Entity Administrator on file, SAM will send an email with instructions after the CAGE Code assignment or validation process is complete. New or updated non-federal registrations will not be activated until an approved Entity Administrator notarized letter is on file, strengthening the user authentication process.

- Streamlined the Entity Administrator letter review process by creating a user interface for Federal Service Desk representatives to confirm directly in SAM.gov which entities have provided notarized letters. FSD representatives will use the new Notarized Letter Approval page to record the reference FSD ticket number, indicate that the registrant has provided an approved notarized letter, and confirm the entity's administration preference.

### **Entity Registrations**

- Updated the SAM Status Tracker text for entity registrations in Submitted status to include a Pending Notarized Letter message to ensure entity administrators are aware of the additional step required prior to activation.

### **Site Wide**

- Updated email notification language for entities with an approaching expiration date in 60, 30, or 15 days and for submitted registrations required to provide a notarized letter formally appointing their entity administrator prior to activation. The email notifications provide additional guidance and instructions for fulfilling the requirement of submitting an original, signed notarized letter in which an officer or other signatory authority designates the entity administrator.
- Fixed an issue identified in the April 6 release which had partially masked the Taxpayer Identification Number (TIN) even for federal government users with For Official Use Only access based on their individual user account tied to an identified government email domain.

## **FPDS**

Software releases are enhancements and changes made to the Federal Procurement Data System - Next Generation (FPDS) software via service packs. The following recent software release has been completed as of June 18:

- FAR Case 2018-004 increased the Micro Purchase Threshold (MPT) from \$3,500 to \$10,000 and the Simplified Acquisition Threshold (SAT) from \$150,000 to \$250,000.
- Validation rule 9A10 will be suppressed when a "Federal Assistance Awards" vendor is used and the contract is for emergency or compelling needs. "Federal Assistance Awards" vendors have 'Z1' or 'Z4' for "Purpose of Registration" in SAM.

- The report logic will be updated to exclude contracts with a “YES” value for the vendor’s business type, based on the report requirements. For more details on which vendor business types are excluded, please review the report appendix.
- The workflow logic of the Recycled Content Product Purchasing report will be updated to include the three missing values for the Recovered Materials/Sustainability section. The workflow calculations will be fixed to display the correct percentages for the summary view, as well as the correct Total Actions and Total Dollars percentages.

For more details on the recent software release please visit FPDS for release notes:

[https://www.fpds.gov/wiki/index.php/V1.5\\_June\\_2018\\_Release](https://www.fpds.gov/wiki/index.php/V1.5_June_2018_Release)

## How to Download Assistance Listings Extracts in beta.SAM.gov

We recently retired the Catalog of Federal Domestic Assistance (CFDA.gov) and everything you used to do in that system can now be done in beta.SAM.gov. Users can now download all assistance listings program data in an Excel spreadsheet from beta.SAM.gov.

In order to promote the sharing of assistance listings program data and offer a means for related government systems to download data reliably and efficiently, beta.SAM.gov provides users with the ability to download program data in the common .csv format.



While on beta.SAM.gov, select the main menu (the three parallel lines at the very top of the site to the left of the magnifying glass). A drop-down menu will appear and select **Data Services**. On the next page, select **Assistance Listings**. There, you have three electronic folders to choose from:

- **Datagov:** This folder contains complete extracts published on a weekly basis and all the elements that are part of an assistance listing (program title, number, agency, objective, etc.). If you are familiar with the electronic



download option on CFDA.gov, you'll find a similar file named "AssistanceListings\_DataGov\_PUBLIC\_CURRENT.csv" in the main datagov folder.

- **Usaspendinggov:** This folder contains files that provide the complete listings and is published weekly.
- **Grantsgov:** This folder contains files that are published daily and have a more limited set of information (containing program name, number, agency, URL to the listing itself, and published date).

The files located within these folders are what GSA provides to data.gov, usaspending.gov, and grants.gov. Once you find the extracts you are looking for, you will be able to use them as you did before. You can also quickly sort any of these extracts by agency and program number.

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## SAM.gov Changes You Need to Know About

GSA's IAE is working hard to deter fraudulent activity in SAM.gov. We have already introduced several enhanced controls. More changes are coming that will impact you.

The recent requirement to submit a notarized letter identifies that an authorized administrator for each entity is not changing. However, because of the work we've already done, **some registrations will now be activated prior to GSA receiving and approving the physical notarized letter.** This was true for all registrations after June 29. If you don't submit the notarized letter within 30 days, your registration may no longer be active.

Effective **June 29**, all non-federal entities who create or update their registration in SAM.gov will no longer need to have an approved Entity Administrator notarized letter on file before their registration is activated. All non-federal entities still must mail the original, signed copy of the notarized letter to the Federal Service Desk. Failure to do so within 30 days of activation may result in the registration no longer being active.

There are some other critical changes coming soon to the way you log in to SAM. Please stay tuned to this space for information in the next few days. To prepare for the changes, **make sure you know the email address you use to register your entity in SAM!**

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## FBO.gov Moved to a New Hosting Environment

Federal Business Opportunities (fbo.gov) recently moved to a new hosting site. This may impact users with strict IT security requirements.

Visitors to the fbo.gov website rely on the single location for information pertaining to governmentwide contract actions expected to exceed \$25,000. The contractor who manages fbo.gov



for GSA recently changed the website hosting environment and the IP addresses associated with the site.

Most users won't notice any change. However, if your company has an interface with FBO, such as using the File Transfer Protocol (FTP) or receiving email confirmations, you'll want to check on local IT security requirements to see if these transactions are affected. For instance, if your company pulls from the FTP on an automatic or regular basis, you may not receive a confirmation notice because the IP address must be whitelisted. Whitelisting identifies entities that are provided a particular privilege, service, or access in order to be recognized by the program. As you may know, FBO supports the public FTP site to anonymously share notice information with users.

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## Engaging Our Stakeholders

In the third quarter of Fiscal Year 2018, the IAE's design lead for beta.SAM.gov, Christy Hermansen, continued to demonstrate the latest advancements on beta.SAM.gov with government and industry partners. The most recent update included the successful retirement of CFDA.gov and migration of all assistance listings data to beta.SAM.gov. Along with Kat Rollins, the IAE product manager for beta.SAM.gov, Hermansen presented at these key events:

### The 28th Annual Government Procurement Conference

On April 19, IAE Product Manager Katherine Rollins gave a presentation in Washington, D.C. about the IAE's progress on beta.SAM.gov to an audience of small businesses looking to do business with the federal government. Participating firms were updated on the progress of the modernization effort since CFDA's retirement and informed on the plans for the upcoming WDOL.gov retirement.

In the display hall, the IAE's Design Lead Christy Hermansen and Program Analyst Anthony Melia gave interested users an online tour of beta.SAM.gov, answering questions about the transition and demonstrating how to provide feedback as the site continues to be developed. Visitors who stopped by the GSA booth ranged from small business owners to prime contractors, as well as federal government representatives - all looking to foster business partnerships.



From left to right: Christy Hermansen, Salomeh Ghorbani, Anthony Melia, Maureen Healy, Mark Rivard, Katherine Rollins

## Department of Defense Procure to Pay Training Symposium

In Orlando, Florida, on May 3, Kat Rollins joined Christy Hermansen at the P2P symposium to provide federal agency officials and industry contracting representatives a better understanding of the changes happening to beta.SAM.gov. Kat showcased the new consolidated approach to role management and migration on beta.SAM.gov. This advanced process will ensure efficient government management of P2P activities and lessen the burden for standard data and processes, use of enterprise systems, and related internal controls that are in line with audit requirements.

## Federal Demonstration Partnership and Electronic Research Administration Committee Meetings

On May 10, Christy Hermansen had the opportunity to speak with federal agency representatives as well as representatives from research institutions in Washington, D.C., to discuss the future direction of SAM, what data will be captured related to entities in SAM, and the technical options for data exchange or APIs. The Federal Demonstration Partnership (FDP) has been very involved in providing feedback and assisting federal agencies with future development of federal award systems.

Hermansen also attended, the Electronic Research Administration Committee (eRA) luncheon. This was a more intimate group of members that focused their conversation on how the FDP's research data can assist GSA going forward with the beta.SAM.gov development.