

U.S. General Services Administration

Welcome! The program will begin at 11:00 AM EST.

If you would like to view live closed captioning, keep the meeting open and in another window go to this link:

https://www.captionedtext.com/client/event.aspx?EventID=4999144&CustomerID=321

The slide presentation and a recording of this forum will be posted to the IAE space on Interact.GSA.gov after the event.

Please post questions to the Q&A log. Thank you!



U.S. General Services Administration

# Getting a Unique Entity ID (SAM)

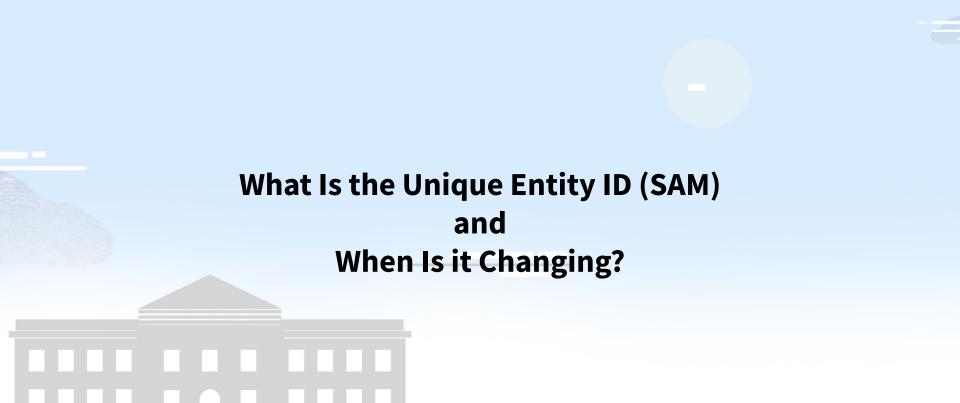
Katherine Rollins Lead Program Manager, SAM.gov

IAE Stakeholder Forum January 25, 2022

## **Questions We Will Answer Today**

- What Is the Unique Entity ID? When Is it Changing?
- Why Is the Change from the DUNS Number to Unique Entity ID (SAM) Happening?
- What Does the Unique Entity ID (SAM) Mean for Me?
- FAQs About the Unique Entity ID (SAM)
  - Is a DUNS Number the same as the UEI?
  - Does the UEI expire?
  - Does the UEI impact the CAGE/NCAGE Code?
  - I'm a prime awardee; how do I get my subs' UEI?
  - I have a UEI, but on SAM.gov, it says "not registered." What does that mean?
  - If I was awarded a grant under my DUNS Number, do I now report using my UEI?
  - Will someone send me our UEI?
  - Do I need a registration? Do I need a UEI?
- Getting a Unique Entity ID (SAM) With or Without New Registration
- Getting Help After April 2022







## What Is the Unique Entity ID?

### **DUNS Number**

The **authoritative** unique entity identifier used by the federal government <u>today</u> is the **DUNS Number** 

- The DUNS Number is a 9-character numeric value
- Managed, granted, and owned by Dun & Bradstreet

## DUNS 012345678

## Unique Entity ID (SAM)

The **authoritative** unique entity identifier used by the federal government <u>in the future</u> will be the **Unique Entity ID (SAM)** 

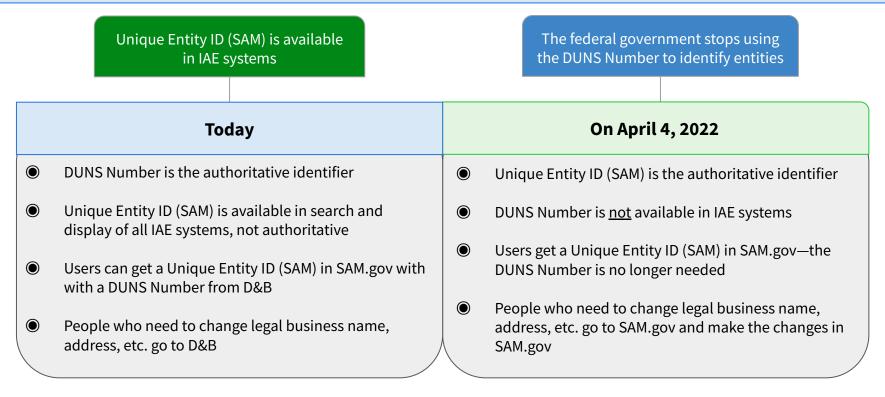
- The Unique Entity ID (SAM) is a 12-character <u>alpha</u>numeric value
- Managed, granted, and owned by the government

SAM ABC012345678



 $\rightarrow$ 

## When is the Unique Entity ID Changing?







# Why Is the Change from the DUNS Number to Unique Entity ID (SAM) Happening?



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## Why Is the Change from DUNS to Unique Entity ID Happening?

- Changing from DUNS to the Unique Entity ID (SAM) is a **federal governmentwide** initiative.
- The Office of Management and Budget (OMB) directed federal agencies to complete their transition to the Unique Entity ID (SAM) no later than April 4, 2022.

The federal government is **streamlining** the entity registration process and **making it easier for entities** to do business with the federal government.

Entities will be assigned an identifier during registration or can request one at SAM.gov without needing to register

You will not need to go to a third party to obtain an identifier or to get help.



## **Agency Implementation across the Federal Government**

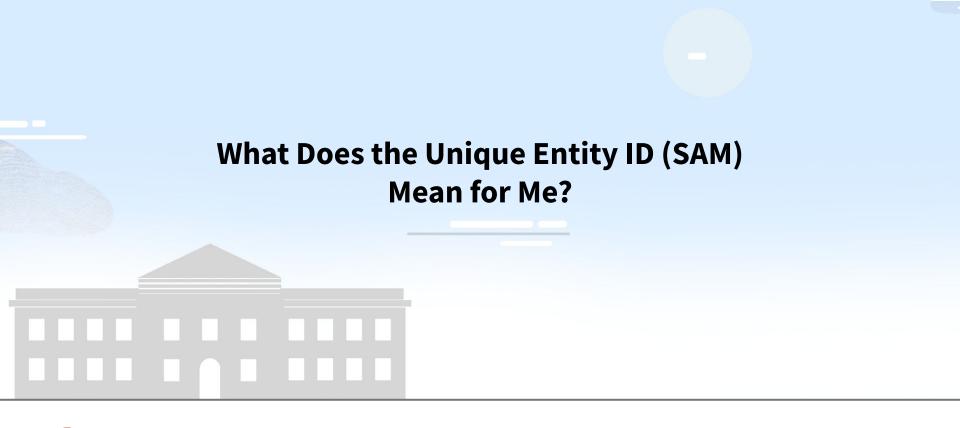
Federal agencies you do business with will provide information about how to use the Unique Entity ID in their award and payment processes.

- For example, Grants.gov has already initiated its transition.
- Go to:

grants.gov/web/grants/forms/ planned-uei-updates.html Federal agencies are **managing their own** Unique Entity ID transition plans.

- They will update their own:
  - Procurement award processes and systems
  - Grant award processes and systems
  - Invoicing and payment processes and systems







## What Does the New Unique Entity ID Mean for Me? (1 of 6)





## What Does the New Unique Entity ID Mean for Me? (2 of 6)

I'm a sub-awardee NOT registered in SAM.gov and I use the DUNS Number for subaward reporting

- Request a Unique Entity ID (SAM) in SAM.gov today.
   A DUNS Number is still required. No registration will be required.
- □ Share your Unique Entity ID (SAM) with your prime(s) so they are ready to report after <u>April 4, 2022</u>.



## What Does the New Unique Entity ID Mean for Me? (3 of 6)

I pull data and reports from IAE systems using APIs or the FPDS Atom Feed.

Go to the source site to review the specific changes that are occurring.

The Unique Entity ID (SAM) is available now, along with the DUNS Number, in SAM.gov APIs, data extracts, and the FPDS Atom Feed.

On **April 4, 2022**, only the new Unique Entity ID (SAM) will be provided and the DUNS fields will go away or return blank or null values.



## What Does the New Unique Entity ID Mean for Me? (4 of 6)

I search for entity and award information using the DUNS Number.

- If you have saved searches in SAM.gov that use the DUNS Number, edit those searches to use the Unique Entity ID (SAM) before April 4, 2022. If you do not change those saved searches, they will not work after April 4, 2022.
- If you have ad hoc contract data reports that use a DUNS field, you must change those reports to use a Unique Entity ID (SAM) field. If you do not update your reports, they will not work after April 4, 2022. There are instructions on how to update your reports at FSD.gov (search for "ad hoc reports UEI").



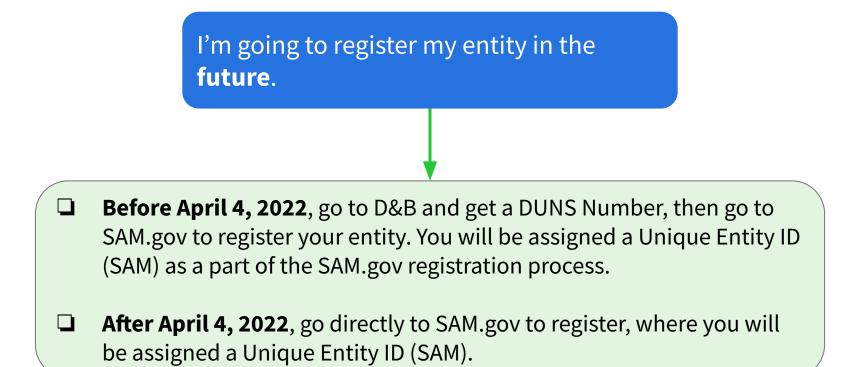
## What Does the New Unique Entity ID Mean for Me? (5 of 6)

I'm a prime awardee and I use the DUNS Number for subaward reporting in FSRS

- Get your sub-awardees' Unique Entity IDs. You can find them in SAM.gov by searching on the DUNS Number. If you cannot find it, contact your sub-awardee.
- □ Starting on <u>April 4, 2022</u>, use the Unique Entity ID (SAM) for reporting. The DUNS Number will no longer be in any system.



## What Does the New Unique Entity ID Mean For Me? (6 of 6)







# FAQs About the Unique Entity ID (SAM)



# Is a DUNS Number the same as the Unique Entity ID (SAM)?

### Answer

No, the UEI is owned and assigned by the federal government. The DUNS Number is owned and assigned by a private organization, Dun & Bradstreet.

The Unique Entity ID (SAM) is 12 characters long and alphanumeric. The DUNS Number is numeric and only 9 characters.

They are both identifiers assigned to a business or organization identifying them as unique. On April 4, 2022, the Unique Entity ID (SAM) will be the identifier used by the federal government to identify your business or organization.



### Answer

No, once a Unique Entity ID (SAM) is assigned to your business or organization, it will not expire.

If you have a registration on SAM.gov, that expires and and must be renewed each year to remain active. If your registration expires, you will still have a Unique Entity ID (SAM) assigned to your organization.

# (?) Does the Unique Entity ID (SAM) impact the CAGE/NCAGE code?

### Answer

No, CAGE and NCAGE codes are completely separate from the Unique Entity ID (SAM).



# I'm a prime awardee; how do I get my subs' Unique Entity ID (SAM)?

### Answer

You can search entity information on SAM.gov for your sub. If they have gotten their Unique Entity ID (SAM), it will be displayed on their entity record (if their information is set to public display).

If you can't find their Unique Entity ID (SAM), reach out to your subs directly. They may need to go to SAM.gov and get their Unique Entity ID (SAM), or their information may not be publicly displayed.

# (?) I have a Unique Entity ID

(SAM), but on SAM.gov, it says "not registered." What does that mean?

### Answer

Getting a Unique Entity ID (SAM) only and registration on SAM.gov are different.

Getting a Unique Entity ID (SAM) is a validation that your entity is what you say it is: a unique organization with its own physical address. "Getting a UEI" in SAM.gov refers to just that—getting a UEI only, not registration.

"Entity registration" is a more involved process where you provide certain information about your organization and get a Unique Entity ID (SAM) along the way (if you don't already have one). "Register" in SAM.gov always refers to entity registration.



# If I was awarded a grant under my DUNS Number, do I now report using my Unique Entity ID (SAM)?

### Answer

Each federal agency is responsible for managing how they shift from using the DUNS Number to using the Unique Entity ID (SAM).

Reach out directly to the awarding agency for instructions on when and how to use your Unique Entity ID (SAM).



# ?

## Will someone send me our Unique Entity ID (SAM)?

### Answer

GSA is not contacting organizations directly about the Unique Entity ID (SAM). If you have an entity registration, active or inactive, you can sign in to SAM.gov anytime and view your entity record where the Unique Entity ID (SAM) is displayed.

If you do not have a registration, but need a Unique Entity ID (SAM), you need to go to SAM.gov, choose "Get Started," and select the "Get Unique Entity ID" option to get a UEI.

# Do I need a registration? Do I just need a Unique Entity ID (SAM)?

### Answer

It's up to you and your organization. It's a business decision.

Whether to register your entity depends on whether you want to be in charge of bidding on or applying directly for awards and assistance from the government.



### **Register Your Entity or Get a Unique** Entity ID

SAM.GOV°

Search

How am I affected?

I manage an entity.

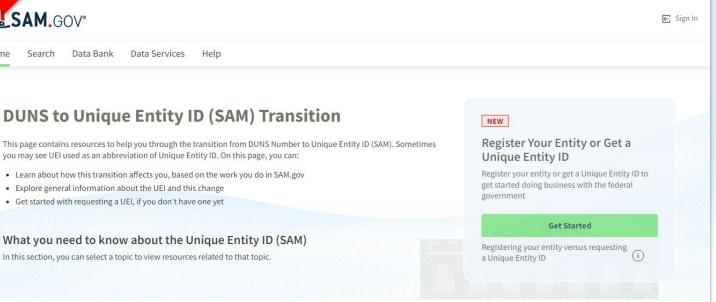
I am a subcontractor.

Data Bank

Register your entity or get a Unique Entity ID to ge started doing business with the federal governme

# Get Started Home **Renew Entity Check Registration Status**

To learn more see our new page on the transition on SAM.gov, linked from the homepage.

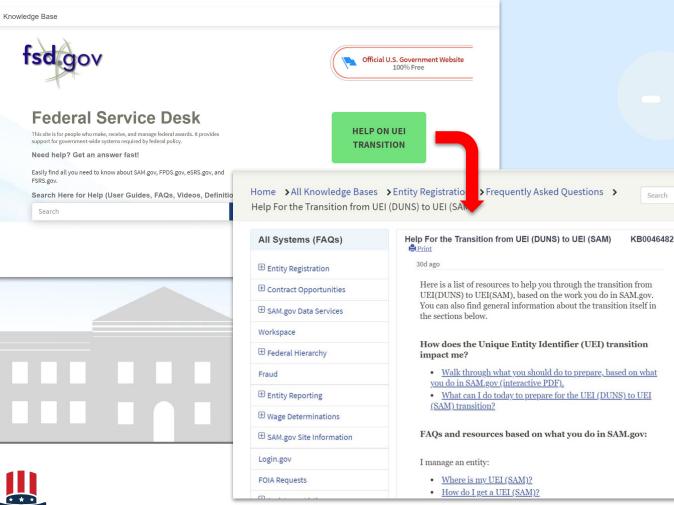


How am I affected?

Walk through what I should do to prepare, based on what I do in SAM.gov (interactive PDF).

What can I do today to prepare? 2





Home

Also, more help is available on the FSD.gov home page.

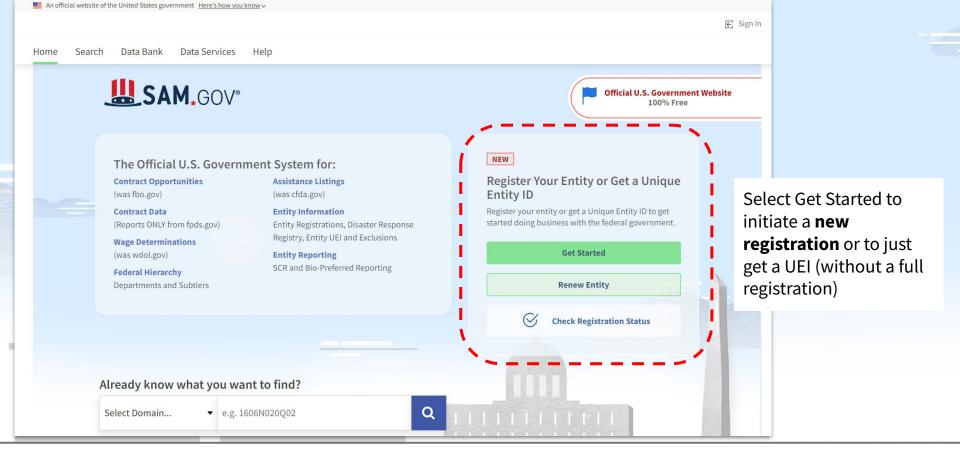
Access it <u>here</u> (from fsd.gov)

Access the NEW UEI Ouick Start Guide or view the video on Getting a Unique Entity ID.

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# Getting a Unique Entity ID (SAM) With or Without a New Registration







### SAM, GOV®

📝 Requests 🖳 Notifications 🎛 Workspace 🕀 Sign Out

Home Search Data Bank Data Services Help

### < Entity Management

### **Get Started**

### **Register Entity**

An entity registration allows you to bid on government contracts and apply for federal assistance. As part of entity registration, we will assign you a Unique Entity ID (SAM).

Comprehensive and current entity information is an essential part of the federal award process. It is important to prepare your information and allow sufficient time to understand and accurately complete your registration. You only need to complete and manage it here to remain eligible for federal awards.

You must renew your registration every 365 days for it to remain active.

### **Register Entity**

### Get Unique Entity ID (SAM)

If you only conduct certain types of transactions, such as reporting as a sub-awardee, you may not need to complete an entity registration. Your entity may only need a Unique Entity Identifier.

You can get a Unique Entity ID (SAM) for your organization without having to complete a full entity registration.

### Get Unique Entity ID

Next, choose whether you need a registration or only a Unique Entity ID(SAM).

If you choose registration, you will be taken to the purpose of registration page.

If you choose to get Unique Entity ID (SAM), you will be taken to enter the entity information.

If you already have a registration, you already have a Unique Entity ID (SAM). Just go to the main search to view the UEI (SAM).



Selecting "Register entity" from the previous screen will take users here starting February 5, 2022.

Here you will need to determine your purpose of registration and whether you are bidding on contracts and financial assistance or just financial assistance.

The look is changing but the process remains the same.

## **Purpose of Registration**

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.

### What type of entity are you registering?

- Business or Organization
- ) U.S. State Government
- U.S. Local Government
- ◯ Tribal Government
- O Foreign Government

### Why are you registering this entity to do business with the U.S. government?

- I want to be able to bid on federal contracts or other procurement opportunities. I also want to be able to apply for grants, loans, and other financial assistance programs.
- ight) I only want to apply for federal assistance opportunities like grants, loans, and other financial assistance programs.



You will be able to review you selected purpose of registration and see an outline of the upcoming steps you will need complete based on your purpose of registration.

You will also be shown all the necessary documents or information before you move into the next step of entity registration.

You can decide to change the Purpose of Registration or continue forward.

Purpose of Registration ALL AWARDS	Change Purpose of Registration		
iased on the answers you provided on the previous page, you must complete th	ne following entity registration sections.		
ID Unique Entity ID	All registration types		
Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tem Ut enim ad minim veniam, quis nostrud exercitation	por incididunt ut labore et dolore magna aliqua.		
Core Data	All registration types	Gather Your Information	
Core Data Includes, but is not limited to, an entity's DUNS and/or DoDAAC, na number, general information, financial information, and details about any pre involved.			
INVIVED.		Purpose of Registration ALL AWARDS	Change Purpose of Registration
O Assertions	"All Awards" only		
Documents self-assertions from each entity. Includes, but is not limited to, da entity provides, the entity size, optional Electronic Data Interchange (EDI), an		U.S. REGISTRANTS:	INTERNATIONAL REGISTRANTS:
FAR and DFAR*5* Representations & Certifications Documents an entity's representations and certifications related to their sma		<ul> <li>Entity Details:</li> <li>Legal Business Name</li> <li>Physical Address</li> <li>Date of Incorporation (if applicable)</li> </ul>	<ul> <li>Entity Details: Legal Business Name Physical Address</li> </ul>
Federal Acquisition Regulation (FAR) and Defense Federal Acquisition Regulat Architect-Engineer Responses (SF330 Part II).n	ion Supplement (DFARS) provisions/clauses, and	State of Incorporation (if applicable)	<ul> <li>Taxpayer Information: Taxpayer Identification Number (TIN)</li> </ul>
🙌 Points of Contact	All registration types	<ul> <li>Taxpayer Information: Taxpayer Identification Number</li> </ul>	Taxpayer Name
The entity will be asked to provide contact information for any mandatory PC the registration process. Includes, but is not limited to, accounts receivable, e		(TIN) Taxpayer Name	Review your tax documents from the IRS (such as a 1099 or W-2 form) to find your Taxpayer information.
I you want to obtain federal contract awards, you must complete all four sec tepresentations & Certifications (Reps & Certs), and Points of Contact (POCs). TI 7A9 in FAR 52.204-7 System for Award Management.	nis is required by the Federal Acquisition Regulation	Review your tax documents from the IRS (such as a 1099 or W-2 form) to find your Taxpayer information.	Banking Information: Routing Number Account Number
you are only interested in federal assistance opportunities, such as grants and loans, you must complex three sections of the giaratomic Core Duka Representations & Carefinations (Reps. & Carefinations), and POLE. If you exick later to pursue detend incomact wards, you must update your SMM registration to change your purpose of registration and complete all four sections. so of Pohumay 2, 2013, all entities registrating for All Awards or Federal Assistance Pohy, will be required to review the Financial satisfance Representations and Certifications. These are a common set of certifications and decrementations required by Federal assistance Representations and Certifications and Certifications and Certifications and Certifications and Certifications and Certifications are providentiated by reference of certifications and Certifications		<ul> <li>Banking Information: Routing Number Account Number</li> </ul>	Account Type - checking or savings, to set up Electronic Funds Transfer (EFT).
tatutes or regulations in accordance with grants guidance under Title 2 of the C or or are a recipient of a Federal grant or agreement, you must agree to the gran representations & Certifications section of your entity registration.		Account Type - checking or savings, to set up Electronic Funds Transfer (EFT).	⊘ NCAGE Code:
Previous Cancel Next	)		NATO Commercial And Government Entity (NCAGE) Code from the NATO Support and Procument Agency (NSPA). If you don't already have one, you may request an NCAGE Code online for FREE from NSPA.
		Neters	④ Go to NCAGE Request Ø
		entity registration in SAM. An entity registration m	representatives are responsible for ensuring the accuracy of an ust be renewed every 365 days in order to remain active and w xpired registration may affect the ability to do business with th



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### **Enter Entity Information**

Today, when you choose to get a Unique Entity ID (SAM) only, you will go straight to this screen.

Starting February 5, 2022, if you are registering, you will see this screen after you choose your purpose of registration and entity type.

Until April 4, 2022, entering your DUNS Number is required.

After April 4, 2022, the DUNS Number is NOT required.

0	2	3	4
Enter Entity Information	Validate Information	Request UEI	Receive UE
Enter Entity Informal All the following information wi	t <b>ion</b> Il be used to validate your entity,	unless marked as optional.	
DUNS Unique Entity ID			
Legal Business Name If you are acting on behalf of a limited p state filing office.	artnership, LLC, or corporation, your lega	l business name is the name you regist	ered with your
Physical Address Your physical address is the street addr not be used as your physical address.	ess of the primary office or other building	where your entity is located. A post off	ice box may
Country		•	
Street Address 1			
Street Address 2 (Optional)			
ZIP Code (+4)			
City	State		





### **Confirm Entity Information**

Here is where you will view the match of your entries to the information provided by Dun & Bradstreet.

You will confirm a match or, if no match, you will be instructed to contact Dun & Bradstreet.

You will also be given the option to limit your entity registration to just federal users searching SAM.

Enter Entity Information	Validate Information	Request UEI	Receive UE
Validate Information	1		
The information you provided	matches the following entity:		
YOU ENTERED:			
US TEST COMPA DUNS UNIQUE ENTITY 362261781 PHYSICAL ADDRESS 3501 CORPORATE PARI CENTRY VALLEY, PA 180 US	ID: KWAY		
WE FOUND THE FOL	LOWING MATCH:		
US TEST COMPA DUNS UNIQUE ENTITY 362561781 PHYSICAL ADDRESS 3501 CORPORATE PKW CENTER VALLEY, PA 180 US	ID: Y		
If you feel displaying non physical address in the se organization, you can res non-sensitive registratior	d record to be a public o sensitive information like your reg arch engine results poses a securit rict the public viewing of you reco information remains available un SM public data file. Learn more a	istration status, legal business nai ty threat or danger to you or your rd in SAM's search engine. Howevi der the Freedom of Information Ad	er, your ct to

### **Enter Entity Information**

All the following information will be used to validate your entity, unless marked as optional.

### No Match Found

We were unable to find a match for the information you entered. Please check your DUNS number, Legal Business Name, and Physical Address to be sure they are accurate then try to validate information again. If you are unable to match your information, please contact Dun & Bradstreet.

Go to Dun & Bradstreet ☑

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### **Request the UEI**

Once you select your entity, one of three outcomes could happen:

- a. Your entity is already registered and you can request a role
- b. Your entity has already been assigned a UEI
- c. Your entity is new to SAM.gov

If the entity is new, you will see the following screen. You must certify you are authorized to take this action for the entity.

Once you have the UEI, you can continue the registration process.

Enter Entity Information	Validate Information	Request UEI	4 Receive UE
Enter Entry mormation	validate information	Request OLI	Receive of
Request UEI			
en sont • a consectante. En acesso se			
You have completed validation	n. Select <b>Request UEI</b> to be assign	ed a Unique Entity ID.	
VERIFIED MATCH:			
US TEST COMPA	NY 549 • Public		
US TEST COMPA			
US TEST COMPA	ID: Y		

Before requesting your UEI, please certify that you are authorized to conduct transactions under penalty of law to reduce the likelihood of unauthorized transactions conducted for my entity. Then select **Request UEI**.

I certify that I am authorized to conduct transactions on behalf of the entity.

equest UEI



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# **Getting Help After April 2022**



## Getting Help with UEI After April 2022

**Starting in April 2022**, you will no longer use the DUNS Number to get a UEI or to register. You will no longer need to go to Dun & Bradstreet if you need help validating your entity.

Instead, there will be a "**Create Incident**" button where, if you need help getting your UEI (e.g. the system can't find a entity match), the system can create a help ticket with your information and assign a ticket number. You will then receive the link to your ticket information.



### **Enter Entity Information**

All the following information will be used to validate your entity, unless marked as optional.

### No Match

We were unable to find a match for the information you entered. Please check your information and try again. If you are unable to find a match, select **Create Incident** to contact the Federal Service Desk (FSD).

Create Incident

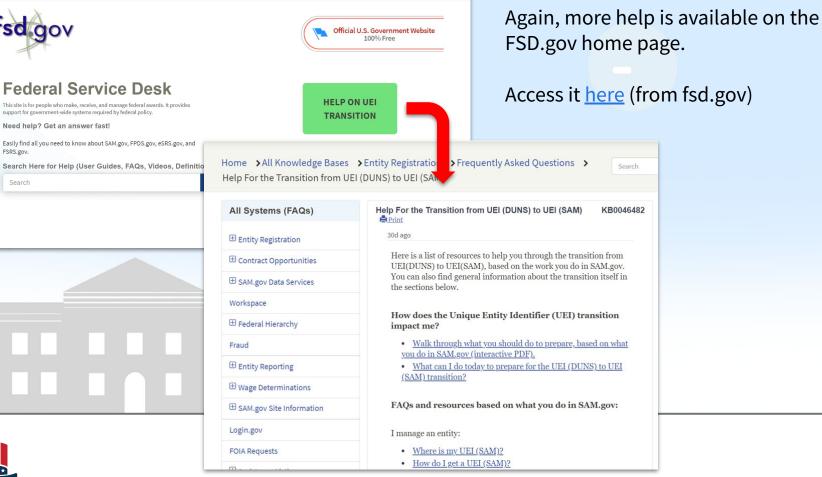
### Legal Business Name

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If you are acting on behalf of a limited partnership, LLC, or corporation, your legal business name is the name you registered with your state filing office.

Tardegrade Floral Associates, LLC





### We Want Your Feedback!

# Our feedback tool is on the footer of all pages on SAM.gov

puges on skinger		Feedback		
		<b>U</b> Feedback	We welcome you to provide feedback on this	
Our Website	Our Partners	Policies		
About This Site	Acquisition.gov ☑	Privacy Policy		
Our Community 🖾	USASpending.gov ☑	Disclaimers		
Release Notes	Grants.gov ☑	Freedom of Information A		
Alerts	More Partners	Accessibility	Submit	
Announcements			submit	
GSA General Services Administration	"FOR OFFIC	<b>CIAL USE ONLY."</b> This system is subject to d unauthorized activities are subject to d	0	





# The Integrated Award Environment

See latest on how GSA is preparing for the federal transition at: <u>GSA.gov/EntityID</u>

Join us on Interact for the latest updates: interact.gsa.gov/group/integrated-award-environment-iae-industry-community

Join the Technical Interface Community by emailing <u>IAE\_Admin@gsa.gov</u>

