

## **Getting a Unique Entity ID (SAM)**

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## **Agenda**

- What Is the Unique Entity ID and 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?
- How Do I Get a Unique Entity ID (SAM) without Registering?
- Preview: Incorporating Getting a Unique Entity ID (SAM) into the SAM.gov entity registration process



# What Is the Unique Entity ID and When Is it Changing?





## What Is the Unique Entity ID?

### **DUNS Number**

The **authoritative** unique entity identifier used by the federal government today 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 in the future 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



## When is the Unique Entity ID Changing?

Unique Entity ID (SAM) is available The federal government stops using in IAE systems the DUNS Number to identify entities On April 4, 2022 **Today** DUNS Number is the authoritative identifier Unique Entity ID (SAM) is the authoritative identifier Unique Entity ID (SAM) is available in search and DUNS Number is not available in IAE systems display of all IAE systems, not authoritative Users can get a Unique Entity ID (SAM) in SAM.gov—the Users can get a Unique Entity ID (SAM) in SAM.gov with DUNS Number is no longer needed with a DUNS Number from D&B Entities with a UEI (SAM) only or a registration can be Entities with a UEI (SAM) only or a registration can be viewed on SAM.gov by searching entity information viewed on SAM.gov by searching entity information







## Why Is the Change from DUNS to Unique Entity ID Happening (1 of 2)?

- ☐ Changing from DUNS to the Unique Entity ID (SAM) is a **federal government-wide initiative**.
- OMB directed federal agencies to complete their transition to the Unique Entity ID (SAM) no later than April 4, 2022.

- ✓ GSA's role in the federal transition is to provide a Unique Entity ID (SAM) to entities.
- ✓ GSA is also preparing all IAE systems (SAM.gov, FPDS, FAPIIS, etc.) to use the new Unique Entity ID.



## Why Is the Change from DUNS to Unique Entity ID Happening (2 of 2)?

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

- This change simplifies the process of registering your organization 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:
  - Grant award processes and systems
  - Procurement award processes and systems
  - Invoicing and payment processes and systems



# What Does the Unique Entity ID (SAM) Mean for Me?





## What Does the New Unique Entity ID Mean for Me? (1 of 4)

I already have a SAM.gov registration.

You've already been assigned a Unique Entity ID!

It's viewable on your entity registration record in SAM.gov.



## What Does the New Unique Entity ID Mean for Me? (2 of 4)

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

You can request a Unique Entity ID (SAM) in SAM.gov **today**. A DUNS Number is still required. **No registration will be required**.

Continue to use your DUNS Number for reporting. Starting on **April 4, 2022**, you will only use the Unique Entity ID (SAM) for reporting.



## What Does the New Unique Entity ID Mean For Me? (3 of 4)

I'm going to register my entity in the **future**. Do I still need the DUNS Number? How do I get a Unique Entity ID (SAM)?

**Before April 4, 2022**, go to D&B and get a DUNS Number, then go to SAM.gov to register your entity. You will be assigned a Unique Entity ID (SAM) as a part of the SAM.gov registration process.

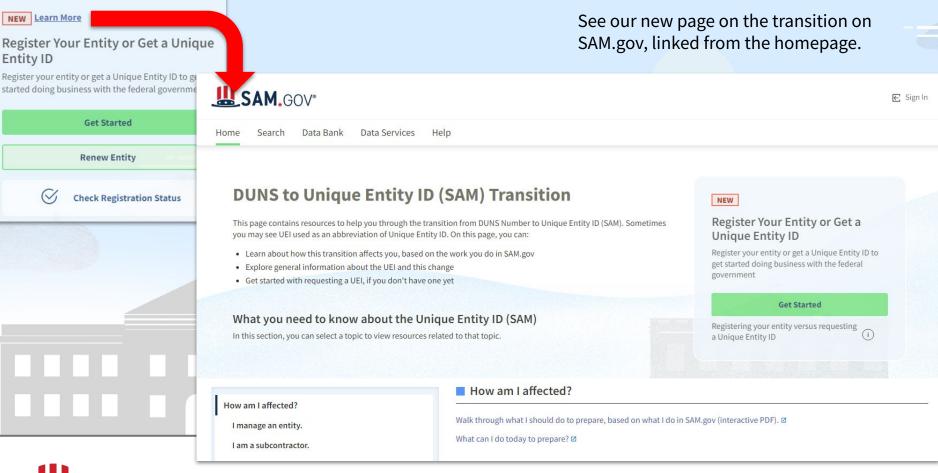


## What Does the New Unique Entity ID Mean For Me? (4 of 4)

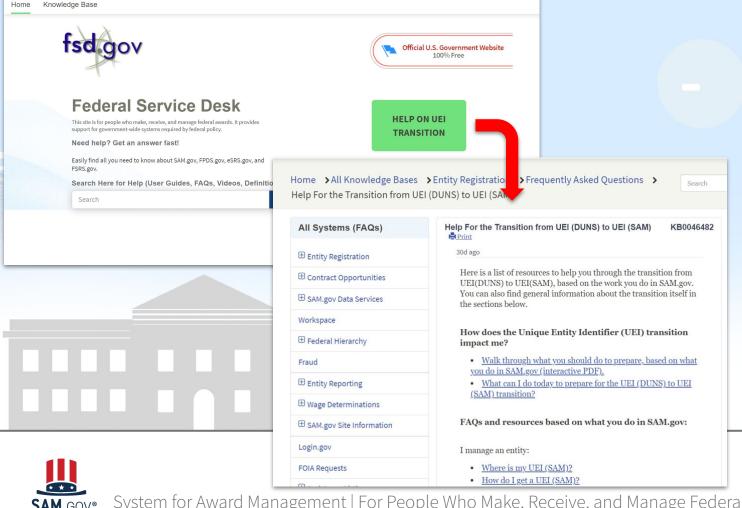
I'm going to register my entity in the **future**. Do I still need the DUNS Number? How do I get a Unique Entity ID (SAM)?

**After April 4, 2022**, you will be assigned a Unique Entity ID (SAM) as part of the SAM.gov registration process. You no longer need to get a DUNS Number for SAM.gov entity registration.









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

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

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

## How Do I Get a Unique Entity ID (SAM) without Registering?



### **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** 

## Right now on SAM

Once signed in you can select "Get Started" from the homepage, entity landing page, and workspace to get a help page for determining which path to take

- entity registration process
- just need a UEI (SAM)

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

If you need a full registration to receive awards or assistance from the federal government, you will need to select 'register entity' from this screen.

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



## Get a Unique Entity ID in SAM.gov (1 of 3)

Select "Get Started" from Entity Management You confirm, if correct widget in Workspace or SAM.gov home page You certify you are authorized to make Select "Get Unique Entity ID" 6 transactions on behalf of the entity You enter your entity's DUNS Number, legal SAM.gov displays your Unique Entity ID business name, and physical address You're done if all you need is a Unique Entity ID. The validation service finds match and displays You can choose to continue to start an entity 8 your entity's name and address registration if you'd like to.



## **Get a Unique Entity ID in SAM.gov (2 of 3)**

**4a** The validation service does not find a match

**5** Check your information and try again

6 If still no match found, go to Dun & Bradstreet and update your information if needed

Go back to SAM.gov 1–2 business days after you make changes to your Dun & Bradstreet record and try again

### **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 ☑



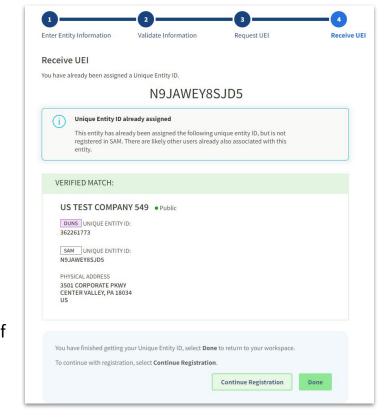
## **Get a Unique Entity ID in SAM.gov (3 of 3)**

**4b** The validation service finds a match and it has already been assigned an entity ID

**5** You confirm, if correct

6 You certify you are authorized to make transactions on behalf of the entity

SAM.gov displays the Unique Entity ID. You're done if that's all you needed. You can choose to continue to start an entity registration if you'd like to.

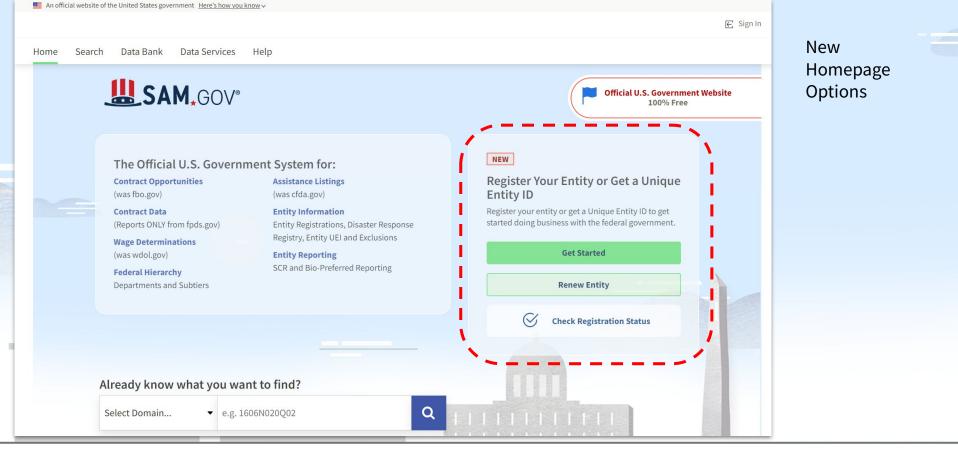




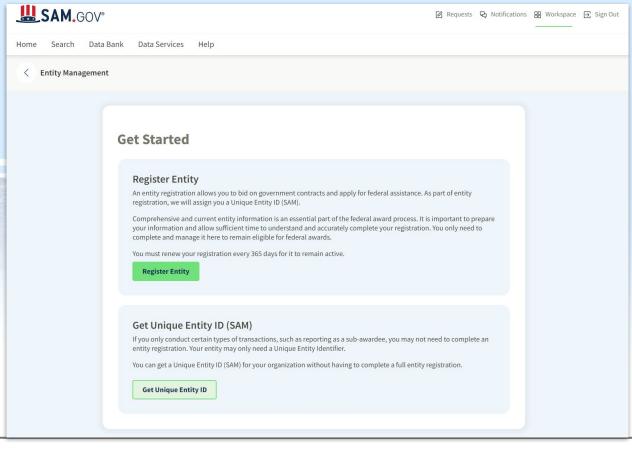
# Preview: Incorporating Getting a Unique Entity ID (SAM) into the SAM.gov Entity Registration Process











Once signed in:
from any of the "Get Started" pages a
help page for determining which path
to take

- entity registration process
- just need a UEI (SAM)

If you opt to complete the full registration, you will be taken to the purpose of registration page.

If you select just 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 UEI (SAM). Just go to the main search to view the UEI (SAM).



## **First Step**

This is the first step in the future **non-federal entity registration**.

In the new registration workflow you will see:

- ✓ Additional help on screen
- √ Changes to look and feel
- ✓ UEI (DUNS) is still used for validation
- ✓ UEI (SAM) assigned with current process.

## **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
- 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.
- O I only want to apply for federal assistance opportunities like grants, loans, and other financial assistance programs.







Previous

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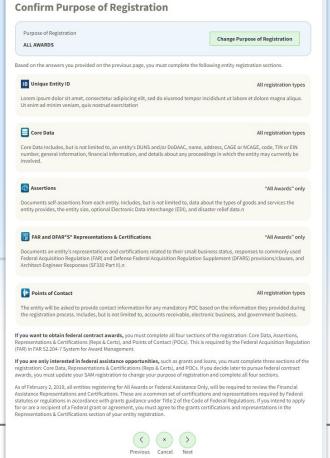


This page informs you of upcoming steps you will need complete.

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

Specific help for those 'interested only in federal assistance opportunities' at bottom of page.







This is a help page to ensure you are ready to complete the registration process.

The Unique Entity ID does not change the required documents and information for you to register in SAM.



### **Gather Your Information**

Purpose of Registration

**ALL AWARDS** 

Change Purpose of Registration

### U.S. REGISTRANTS:

### ( Entity Details:

Legal Business Name Physical Address

Date of Incorporation (if applicable) State of Incorporation (if

applicable)

#### ✓ Taxpayer Information:

Taxpayer Identification Number

Taxpaver Name

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

Account Type - checking or savings, to set up Electronic Funds Transfer (EFT).

### INTERNATIONAL REGISTRANTS:

#### ( Entity Details:

Legal Business Name Physical Address

### ✓ Taxpayer Information:

Taxpayer Identification Number

Taxpayer Name

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

Account Type - checking or savings, to set up Electronic Funds Transfer

### NCAGE Code:

NATO Commercial And Government Entity (NCAGE) Code from the NATO Support and Procurement Agency (NSPA). If you don't already have one, you may request an NCAGE Code online for FREE from NSPA.

→ Go to NCAGE Request 

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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. An expired registration may affect the ability to do business with the Federal government.













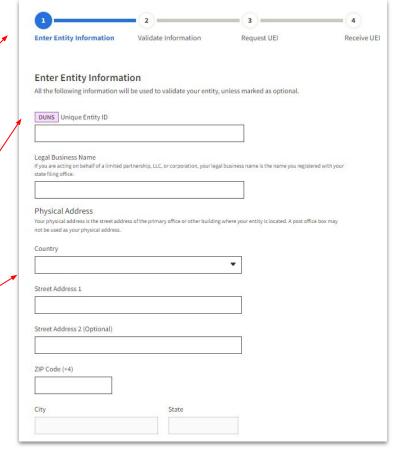
## 1. Enter Entity Information

Easy view of steps so you know where you are in process.

Unique Entity Identifier is still authoritatively the DUNS until April 4th 2022.

Entity validation to get the UEI (SAM) will be against D&B information.

Fields adapt based on user input, e.g. country will change ZIP fields and entering the ZIP will auto-populate the state and city.







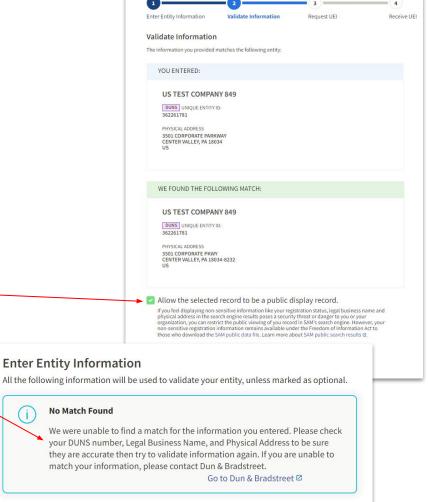
## 2. Confirm Entity Information

Matches displayed are based on a comparison of data entered by the user to D&B data.

We do take a near match. In the case shown "Parkway" was entered by the user, and "PKWY" is in the record

Just as with registrations, the entity can determine—whether they want the UEI to show publicly or just be restricted to federal users.

If no matches are found, the user will be directed to D&B, as they are still the source until April 4th.





System for Award Management | For People Who make, necesse, and manage rederations

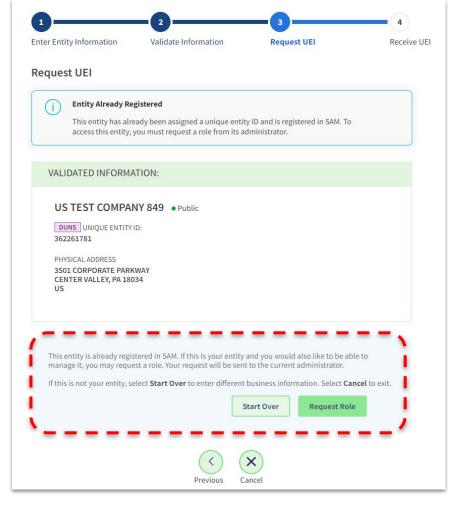


### 3. Request the UEI

Three outcome scenarios:

- a. Entity is already registered in SAM
- Entity has already been claimed and assigned a UEI in SAM
- c. Entity has not been claimed in SAM

This previews the first scenario. If the entity is already registered in SAM, the user will be notified and given an easy path to request a role.

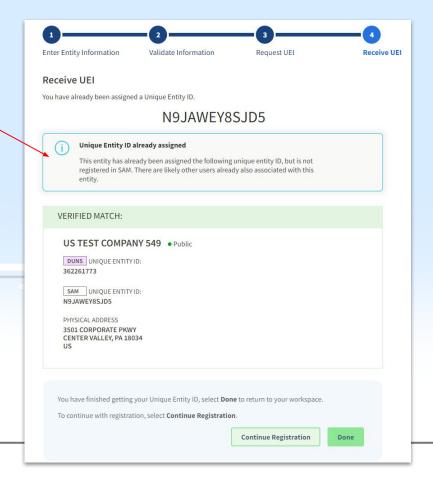




This previews the second scenario where a Unique Entity ID (SAM) has already been assigned to the entity in SAM. You will see the following message.

You are now associated to the entity and can accept any updates from D&B for items such as address changes.

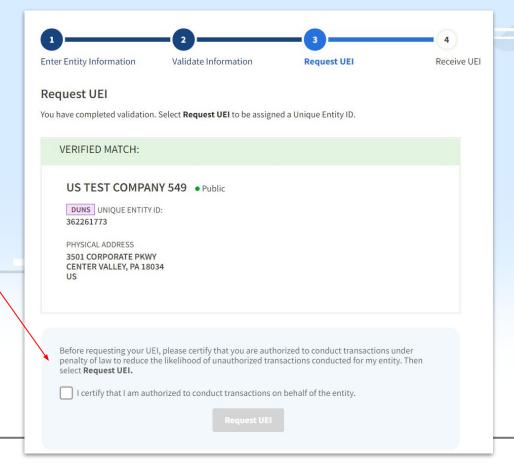
The entity is NOT registered at this point. We do provide that in text on screen and an "easy" button for the user to start the registration from the confirmation page.





The third path is when the Unique Entity ID (SAM) has not been assigned to the entity. You will see the following screen.

You must certify you are authorized to take this action for the entity.







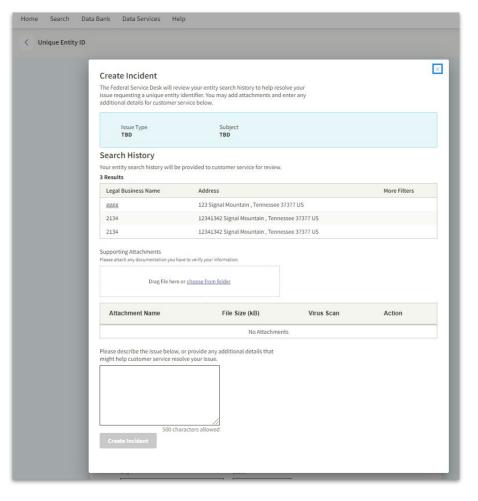
**Starting in April 2022**, the DUNS field will no longer be in the data entry screen, and will no longer show on any search or display pages.

We will also have a "Create incident" option available when you find no matches for your entity. The option will open a ticket that includes your input from step 1, and any matches shown to you in step 2.

The created ticket will go directly to the entity validation service specialists within the help desk.

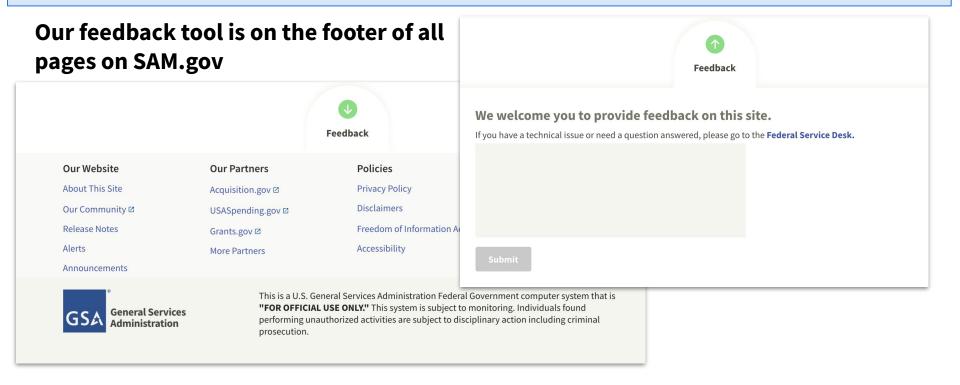
You can also upload additional documents or text to help the agent reviewing the issue.

You will get a notification of the FSD incident number.





## We Want Your Feedback!







## **The Integrated Award Environment**

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

Join us on Interact for the latest updates:

<u>interact.gsa.gov/group/integrated-award-environment-iae-industry-community</u>

Join the Technical Interface Community by emailing <a href="mailto:IAE\_Admin@gsa.gov">IAE\_Admin@gsa.gov</a>



