ACQUISITION HOUR: SYSTEM FOR AWARD MANAGEMENT AND THE DYNAMIC SMALL BUSINESS SEARCH

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Presented by the Wisconsin Procurement Institute
Providing expert technical assistance to FEDERAL, STATE and LOCAL GOVERNMENT Contractors and Subcontractors

A Procurement Technical Assistance Center (PTAC) Serving the Wisconsin Business Community

Wisconsin Procurement Institute

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8 WAYS A SHUTDOWN WOULD DAMAGE HOMELAND SECURITY
GET STARTED WITH THE BASICS
Questions & answers on how to get started.

GET STARTED

SIGN-UP FOR OUR NEWSLETTER
Stay up-to-date with the latest WPI news.

SIGN UP

HAVE A QUESTION? WE'RE HERE TO HELP.
One of our staff of experts is available to answer your questions.

GET HELP

SERVICES OFFERED BY WPI

- FREE Bid Matching Services
- Individual Counseling and Assistance
- Locating Local, State and Federal Opportunities
- Government Market Strategy Development
- Training in use of Government websites and tools
- Assistance with System for Award Management (SAM) Registration
- Assisting in Market Research Process
- Development of Market Profile
- Small Business Subcontracting Plans-Development, Outreach and Reporting
- Small Group Training
- Outreach and training with Local, State and Federal agencies
- Assist with Pre and Post Award Functions
- Assistance with Agency Specific Contracting Requirements
- Assistance with Contracting Regulations and Requirements, including FAR, DFAR, CFR
- Assistance with GSA Schedule Preparation and Administration
- Assistance with Local, State and Federal Certifications, including:
  - Service Disabled & Veteran Owned Small Business, HUBZone, Woman Owned Small Business, 8(a) Business Development Program
  - State
  - Local
  - DBE
- Bid Review and Submission Assistance
- Proposal and Assistance, Review and Submission Assistance
- Capabilities Statement and Related Government Marketing Material Development
- Assistance in Locating and Developing Teaming Partners and Subcontractors
- Updated Government Market Information

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Three VERY IMPORTANT things to do as you begin to prepare to pursue the Federal market

• REGISTER AS A CONTRACTOR
  • SAM (System for Award Management)  
    [www.SAM.gov](http://www.SAM.gov)

• ESTABLISH AN EFFECTIVE SMALL BUSINESS PROFILE
  • Small Dynamic Business Search  
SAM (System for Award Management)
www.SAM.gov
SAM (System for Award Management)

**A FEW TIPS BEFORE YOU GET STARTED**

- **USE GOOGLE CHROME OR MOZILLA FIREFOX** – (both are free to download) - using Internet Explorer may cause functionality issues

- **Allocate enough time** to the process of initial registration or updating of your information – each time you start the process, you will have to start from the beginning and confirm each screen from the beginning.

- **On the Point of Contact Screen** – information may not be entered into the correct fields during the migration from CCR – must be verified.

- **SAM IS FREE!!!**
SAM (System for Award Management)

GETTING FAMILIAR WITH SAM

• Terminology
  • “Entity” – this is your business or organization within SAM
  • “Legacy System Account” – this is your old Central Contractor Registration (CCR) account (if applicable)
  • “User Dashboard” – the SAM “homepage” once you log in – this is where you will initiate updates and new registrations
SAM (System for Award Management)

GETTING FAMILIAR WITH SAM

Layout- New registrations and updates in SAM are broken out into four distinct sections

1. Core Data: includes your business demographics, banking information, location, business type – IMPORTANT because this section will determine your size based on your NAICS

2. Assertions: includes NAICS and PSC codes

3. Representations and Certifications: previously was ORCA – consists of a number of FAR clauses – need to read AND understand each

4. Points of Contact
SAM (System for Award Management)

**What you need to get started**

- DUNS number - [http://fedgov.dnb.com/webform](http://fedgov.dnb.com/webform)
- Banking information
  - Account number
  - Institution name
  - Point of contact at the bank including phone and fax
- Tax information – EIN or SS
  - Company name as it appears on your Federal Taxes – **EXACTLY**
- Information about your firm
  - Number of employees
  - Average revenue from past 3 years
  - Year founded
- NAICS and PSC codes
- Points of contact at your firm (2)
SAM (System for Award Management)

• The REGISTRATION PROCESS
  • New Entity Registration
  • Previously in CCR and active
  • Previously in CCR and expired
• FOR ALL REGISTRATIONS:
  • You MUST register for an INDIVIDUAL ACCOUNT with SAM FIRST.
    • Basic registration, but must have an active and correct e-mail address

The Wisconsin Procurement Institute
SAM (System for Award Management)

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.

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 FOOU Information.

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.

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 FOOU information.
SAM (System for Award Management)

Create an Account

Choose Account Type

Individual Account Details

Create an Individual User Account
* To perform tasks such as register/update your entity (legacy CCR/FedReg and ORCA functionality).
* To create and manage exclusion records (legacy EPLS functionality).
* To view FEDO level data for entity management registration records and exclusion records (Same as government user CCR Tools functionality).

System Account Details

Create a System User Account
* If you need system-to-system communication or you are automating your system pull of the data.
* If you are performing data transfer from SAM to your government database system.
Registering a New Business

Welcome, Joseph Smetak

Welcome to your My SAM page!
Start here to find what you need. Tabs across the top take you directly to useful sections in SAM. You will always see them. The navigation links on the left side of this page give you access to different parts of SAM based on your user account and existing permissions. For example:

Manage My User Roles
Your SAM user account needs roles to do most things in SAM. Here you can see what roles you have or request new roles.

Register/Update Entity
Do you want to do business with the U.S. Federal government? Getting and maintaining an active entity registration record in SAM is key. Here you will find the links to manage your entity registration record(s). If you are updating an entity registration for the first time in SAM, this information came from CCR, ORCA, or FedReg.

Data Access
If you are a Federal government user needing access to SAM data extracts or have a mission requirement for sensitive data, this section contains the information you need to request permission.

If you have any questions, click the Help tab for training materials, FAQs, and contact information for the supporting SAM Help Desk.

Please Note: If you had a user account in CCR, EPLS, or FedReg, you need to migrate your permissions from your old user account to your new SAM user account. Please note that all entity registration records (such as your CCR and ORCA records)
Registering a New Business
Registering a New Business

DUNS Information

Public Identifier:
- DUNS Number:

If you do not have a DUNS Number, please click here to request one.
For assistance, contact Dun & Bradstreet (D&B) US ONLY at 1-866-705-5711 or support@dnb.com. International registrants email: samhelp@dnb.com

Name:
- D&B Legal Business Name: 

DUNS Physical Address:
- Address Line 1:
- Address Line 2:
- City:
- State/Province:
- ZIP/Postal Code:
- Country: UNITED STATES

Back to User Dashboard
Migrating an Expired CCR Account

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Please Note: If you had a user account in CCR, EFLS, or FedReg, you need to migrate your permissions from your old user account to your new SAM user account. Please note that all entity registration records (such as your CCR and ORCA records) have already been migrated from the legacy systems to SAM. The data is here; you just need to connect your user account to the
Migrating an Expired CCR Account

Select Legacy Accounts

If a match was found for the system, you can migrate the matching result. If no results were found, please enter the email address that is tied to your legacy account.

**CCR**

Enter Email Address: 

Can't remember your CCR email address? If you do not remember the email address that you used in CCR or if you no longer have access to it, click here.
Migrating an Expired CCR Account

Select Legacy Accounts

Provide Legacy Account Information

Please provide the following data for the entity registration record you want to manage. All fields are mandatory. The information you enter must match exactly what was in the CCR registration record for the DUNS number you provide. This is to validate your knowledge of the prior record and confirm your right to manage the registration in SAM. Note, the Taxpayer Identification Number (TIN) and the bank Account Number will be masked both when you enter and confirm what you entered.

DUNS *
Taxpayer Identification Number *
Confirm Taxpayer Identification Number *
Bank Routing Number *
Bank Account Number *
Confirm Bank Account Number *

Privacy Act Statement: This information is subject to the Privacy Act of 1974 (5 U.S.C. Section 552a). Collection of the TIN is authorized as stated above. The purpose is to ensure that we can authenticate before we allow access to another file. Furnishing the requested information is required for separation procedures, and failure to provide requested information will prevent processing of a final check or retirement papers, or other appropriate actions. The Social Security Number, authorized by Public Law 93-579 Section 7 (b) and Executive Order 9597, is used as a unique identifier to distinguish between employees with the same names and birth dates and to ensure that each individual’s record in the system is complete and accurate and the information is properly attributed. The Privacy Impact Assessment can be found at http://www.gsa.gov/portal/content/102237. The System of Record Notice can be found at http://www.gsa.gov/portal/content/102236.

Click here to read GSA's IT Security Policy.
Migrating an Expired CCR Account

Notes:

- Easiest way to migrate an expired CCR account *IF e-mail is not working is to submit a help ticket to FSD: https://gsafsd.service-now.com/fsd-gov/
  - Need to be registered on FSD
- Entity needs to provide a notarized letter:
  - Be on your company/organization letterhead, and be signed by your company President, CEO, or other authorized signature authority
  - Contain your company/organization DUNS Number
  - Contain the old CCR Primary and Alternate POCs’ name (if you know it)
  - Contain the new Entity Administrator’s name, phone number, address, and email address
  - Provide a justification for the change
  - Contain this statement above the signature block of your letter and insert the appropriate names where noted:
The purpose of this notarized letter is to verify the identity of [insert name of Entity Administrator]. [Insert name of Entity Administrator] affirms that he or she is an authorized officer, agent, or representative of [insert entity name, or, for individuals not representing an entity, say him/herself]. This letter will authorize [Insert name of Entity Administrator] to have access to the System for Award Management (SAM). SAM is a computer system managed by the Federal Government, and it is only accessible by individuals who are either authorized to represent a particular entity, or by individuals representing themselves. Accessing or using SAM, or information contained therein, for any unauthorized or illegal purposes, may have civil and criminal penalties, and may negatively impact the status of the SAM registration maintained on this entity. I, the below-signed, attest to the accuracy of all information contained in this letter.
SAM (System for Award Management)

A FEW NOTES ON SAM:

- SAM is a relatively new system, so you may experience some functionality issues. Contact WPI if you need assistance completing your registration.

- **SAM is FREE** – there are companies willing to charge to a substantial fee to complete your registration for you. HOWEVER, there are FREE resources to help you if you experience any issues.

- The SAM update is broken out into four sections:
  - Core Data (company information)
  - Assertions (codes)
  - Representations and Certifications (previously ORCA)
  - Points of Contact
SAM (System for Award Management)

A FEW NOTES ON SAM (cont):

• Pay close attention to the Reps and Certs portion

  • Make sure you understand what you are answering – this section is tantamount to a legal document – PENALTIES apply if you knowingly misrepresent your business in SAM – IF YOU ARE NOT SURE – ASK!

• At the end of your SAM registration, you will be asked if you want to register in or update your SBA profile

  • Select **YES**

• Non-Profits do not have a Reps and Certs Portion to fill out
Dynamic Small Business Search & Finding Opportunities
Small Dynamic Business Search – Registration through SAM

- To update your information using the SBA Supplemental Pages, log into SAM
  - Select the Register/Update Entity link. Locate your current SAM registration record.
  - Select the option to update the record. On the left navigation bar, click on the section called SBA Certification followed by the page called SBA Profile. This will generate your link to the SBA Supplemental Pages.
Small Dynamic Business Search – Registration through SAM

The Wisconsin Procurement Institute
Small Dynamic Business Search
http://dsbs.sba.gov/dsbs/search/dsp_dsbs.cfm

Why is it important for a Small Business to be visible and “locatable” in the SDBS? THIS IS WHERE FEDERAL AGENCIES AND PRIME CONTRACTORS SEARCH FOR SUBS / PARTNERS
Small Dynamic Business Search (DSBS)

- The Dynamic Small Business Search is tied to the System for Award Management (SAM)
  - Information that is entered into your SAM profile will be used to populate your DSBS profile
- HOWEVER; there are additional fields that you should update that are not automatically populated
  - Capabilities Narrative
  - Website
  - E-mail
  - Special Equipment/materials
  - Bonding (if applicable)
  - References
Bidmatching

• The Wisconsin Procurement Institute offers a free BIDMatching service
  • WPI’s system searches International, Federal, State and Local procurement databases and emails you relevant solicitations based on information specific to your company
  • Sites searched:
    • 42 International Sites
    • 45 federal sites
    • 2,011 state and local sites
• Contact Joe Smetak for assistance
QUESTIONS???
Wisconsin Procurement Institute (WPI)

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Joseph Smetak, CFCM:
josephs@wispro.org
Upcoming WPI Events

- Acquisition Hour (Bi-monthly webinars) through December, 2015
- Successful Growth Strategies in the Government Marketplace – September 16, 2015 – Milwaukee, WI
- Successful Growth Strategies in the Government Marketplace – September 17, 2015 – Green Bay, WI
- Successful Growth Strategies in the Government Marketplace – September 22, 2015 – Wausau, WI
- Successful Growth Strategies in the Government Marketplace – September 24, Lac du Flambeau, WI
- Successful Growth Strategies in the Government Marketplace – September 29, Racine, WI