

Common Issues & Questions in the System for Award Management (SAM)

Registering in SAM

- **What do I need to register in SAM?**
 1. An active e-mail address (see **Other Issues**) below if you do not have an e-mail account)
 2. A DUNS number (available at no cost at: <http://fedgov.dnb.com/webform>)
 3. Banking information (checking or savings account # and routing #, contact information of your bank)
 4. Point of contact information for the business
 5. General business demographic information
 - Business start date
 - Number of employees
 - 3 years average revenue
 - NAICs Code(s) (You can research your NAICs code(s) prior to registering here: <http://www.census.gov/eos/www/naics/> or by using the search feature imbedded into the SAM site).
- **Does it cost money to register in SAM?** NO! Registering in SAM is absolutely free. Entering “System for Award Management” into a search engine will link to private businesses who charge a fee to register in SAM. While it is a business decision as to whether or not the entity wants to pay a fee to have a 3rd party register them in SAM, there is no cost to register directly on SAM and it generally can be done in less than an hour. The official SAM site is available here: www.sam.gov
- **Should an entity opt out of SAM’s Public Search Option?** Often times an entity will be hesitant to allow their information to be displayed in SAM’s public search option. However, no sensitive information is available via SAM’s public search. It is **STRONGLY RECOMMENDED** that entities allow their information to show up in SAM’s public search. This allows the entity to be found easily by contracting officers or prime contract representatives that may be looking for teaming partners. If an entity is unsure as to whether or not they were once registered in CCR or SAM and they are not found in the SAM public search, the Defense Logistics Agency has a CAGE Code search function called BINCS that is able to retrieve this information:
https://www.logisticsinformationservice.dla.mil/BINCS/begin_search.aspx

Migrating a Legacy System Account

- **Entity needs to migrate an inactive SAM account.** Migration of an inactive SAM account can be complete by one of three ways. For each of these methods, the user must register for an individual account in SAM. Once the user is able to log in, they must:
 - Migrate by CCR E-mail. If the user has access to the e-mail address they used in CCR, they can migrate by their e-mail address. NOTE: SAM will send an e-mail to that address asking the user to verify he/she has access to it. 1. Select *Manage User Accounts* at the User Dashboard after logging in. 2. Select *Migrate Legacy System Account*. 3. Select *CCR* as the legacy system account and then enter the CCR e-mail address and select *next*. If the e-mail address was indeed the one used to register in CCR, a message will appear notifying the entity that an e-mail containing a link that needs to be clicked was sent to their CCR e-mail address. The entity needs to click on that link and then log into SAM to find their entity. (NOTE: Sometimes the user needs to click the link, log into SAM and then close the internet browser and re-open it and re-login to “push” the migrations through).
 - Migrate by banking information: If the user does not have access to their old CCR e-mail address, they have the ability to migrate by banking information. Follow the same steps as above, but instead of entering a CCR e-mail address when prompted, select the option that states, *Can't remember your CCR E-mail 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](#)*. The entity will be prompted to enter their DUNS, TIN, Bank Routing Number and Bank Account Number. After entering this information, and selecting *next*, the entity will be informed if the migration went through.
 - Migrate by Notarized Letter. If the two options above fail, the entity must migrate via the Federal Service Desk (FSD) www.fsd.gov with a notarized letter providing justification as to why that user should have access to that SAM account. Instead of having the entity submit this letter to FSD, I will have them create the letter, sign it and have it notarized and then have them scan it and e-mail it to me. Once I have a copy, I will create a service ticket on my FSD account and let FSD know that I am writing from a PTAC on behalf of the referenced DUNS number. I will ask them to tie the referenced DUNS number to the entity's user name in SAM and then attach the Notarized letter as a justification. Please see attached for directions on what **MUST** be included in the notarized letter.
 - **NOTE:** Once the account has been migrated, it still needs to be **UPDATED**

Registration Problems

- **DUNS Number is associated with an old address or company name:** Often times, a company will have a DUNS number and then change locations or its business name.

Since SAM imports DUNS information, the company must first contact D&B to make this change. Next, the company must wait at least 24 hours before returning to SAM. If they are registering a new entity they can proceed with their entity registration. However, if the business is updating an existing SAM account, they must click the *refresh D&B Data* button located on the *Details Returned by D&B* screen.

- **Updating a SAM profile after an update has already been initiated:** Businesses cannot update their SAM account once an update has already been initiated. They must wait until the update processes before logging back into their account and making the update. SAM will notify the business via e-mail when this occurs.
- **Why did the entity fail IRS TIN Match Validation?** Upon submitting their SAM registration, the entity will go through two validations; IRS TIN Match validation as well as DLA CAGE Code validation. If an entity fails their TIN match validation, they will be notified via e-mail. The business must call the IRS at 1-866-255- 0654 and verify that what they have entered into SAM matches **EXACTLY** with what the IRS has on file. The business will have to initiate an update to their registration and update their TAX ID information. Entering the wrong taxpayer name will also cause the IRS validation to fail. The term taxpayer can be associated with an individual rather than the entity. Also, IRS will generally only speak to the individual who is listed as the creator of the EIN. If a surrogate calls IRS will provide general information only.
- **Why did the entity fail CAGE Code validation?** Upon submitting their SAM registration, the entity will go through two validations; IRS TIN Match validation as well as DLA CAGE Code validation. Commercial and Government Entity (CAGE) codes are five character unique identifiers assigned to businesses by the Defense Logistics Agency (DLA). Often times, businesses will refer to their CAGE Code as their SAM number. When registering in SAM, DLA will perform a CAGE Code validation to ensure that there are not duplicate addresses in their system. If an entity fails the CAGE Code validation, they will be notified via email. The entity must call the DLA Cage Code office for additional information on how to rectify the issue. The DALE Cage Code office can be reached at: 1-877-352-2255.
- **I am a sole proprietorship or an independent contractor. What is my Tax Identification Number (TIN)?** In this case, the business' TIN is their Social Security Number.
- **Transferring MPIN from the business information screen to IRS consent screen:** If an entity is having issues with transferring their MPIN from the business information screen, sometimes copying and pasting the MPIN into the IRS consent screen works. Otherwise, the entity must log out of SAM and then log back in and try again.

- **Why does the entity name not match what D&B has on file?** SAM registration requires companies to enter the business name and for that name to match the business name exactly as it appears on D&B's file. Many entities do not remember the legal business name that D&B has on file and often times the searchable D&B database has the incorrect name. Searching Hoover's (www.hoovers.com) and comparing this information with the State of Wisconsin's Department of Financial Institutions listing (<http://www.wdfi.org/corporations/>) can be helpful.
- **I do not see LLC listed as a business type from the IRS?** From the IRS: "Depending on elections made by the LLC and the number of members, the IRS will treat an LLC as either a corporation, partnership, or as part of the LLC's owner's tax return (a "disregarded entity"). Specifically, a domestic LLC with at least two members is classified as a partnership for federal income tax purposes unless it files Form 8832 and affirmatively elects to be treated as a corporation. And an LLC with only one member is treated as an entity disregarded as separate from its owner for income tax purposes (but as a separate entity for purposes of employment tax and certain excise taxes), unless it files Form 8832 and affirmatively elects to be treated as a corporation." Additional information is available here: <http://www.irs.gov/Businesses/Small-Businesses-&Self-Employed/Limited-Liability-Company-LLC>

Other Issues

- **The administrator of the SAM account has left the company:** In order to assign a new administrator, a service ticket needs to be created with the Federal Service Desk (FSD) www.fsd.gov. SAM requires a notarized letter to assign a new entity administrator. Once the notarized letter is complete, it must be uploaded to the service ticket at FSD. FSD will then assign administrator rights to the individual to which the company wants them assigned. See the Appendix section of this document for the template that FSD required to be uploaded.
- **The business does not have an e-mail account:** SAM requires users to register with an e-mail for an individual account. Google provides free e-mail at www.google.com as does Hotmail at www.hotmail.com. It is entirely up to the business as to what e-mail entity they would like to use.
- **I am a sole proprietorship or an independent contractor. What is my Tax Identification Number (TIN)?** In this case, the business' TIN is their Social Security Number.
- **The e-mail in the user account has changed or is invalid:** If the email address identified on the SAM account is incorrect, the entity will have the option to change the email address by either logging in with their username and password, or clicking "Forgot Password." Just enter the username and old email address, click the "Update Email" button, and correctly answer a security question to make the correction.

- **Why can't an entity edit their IRS TIN Match Screen?** Often times, an entity will have incorrect information under their IRS TIN Match and will not be able to edit this information (TIN, Address, MPIN, Individual Executing Consent). If this is the case, the entity should put an exclamation point (!) at the end of their taxpayer name and then select *Save and Next*. Often times, forcing this error will *pop* open the un-editable fields. If the entity is still unable to edit these fields, they should log out and try logging in under a different browser (firefox or chrome preferred).
- **Company is DBE Certified and has listed themselves as such in the Dynamic Small Business Search (DSBS), but DSBS is not showing them as such:** The DBE field in DSBS is now a *dead* field. Entities are no longer able to edit this field and there is no solution.