System for Award Management (SAM)

WEBINAR: Updating Your Former CCR Entity Registration Record in SAM

May 15, 2013
Outline

▸ Task 1: Create a SAM User Account
  ▪ **Required Information:** Your first name, your last name, your email address, your phone number, your country (select your option from the dropdown list provided), a username, a password, and your responses to three security questions.
  ▪ **Endstate:** You have an active, individual SAM user account.

▸ Task 2: Migrate Legacy Account Roles/Permissions
  ▪ **Required Information:** Create your SAM User Account with the e-mail address you used to manage your legacy system account (CCR, FedReg, ORCA or EPLS) or have that e-mail address on hand.
  ▪ **Endstate:** Your new SAM user account has permission to access and edit your existing entity record.

▸ Task 3: Update Your Entity Record
  ▪ **Required Information:** DUNS Number, D&B Legal Business Name, and Address, Taxpayer Identification Number (TIN), and Taxpayer name.
  ▪ **Endstate:** Your updated entity registration record is submitted for validation.
Who Needs a User Account in SAM?

- Anyone who wants to save search queries
  - Create an individual user account
  - Not connected or associated to an entity record

- Anyone who wants to create or manage a registration record to do business with the Federal government
  - Create an individual user account
  - Take the steps in Task 2 to link your SAM individual user account to your old registration record or create a new record

- Federal government users who need to verify an entity’s registration status as part of their job

- Why are there two types of user accounts in SAM?
  - Individual
    - Tied to the individual who creates the account
    - Can move with the individual if they change organizations, but access and roles will not transfer
  - System
    - Represents a particular information technology system using data within SAM to support Federal government acquisition and award management
Select an Individual Account

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 FOCO level data for entity management registration records and exclusion records (Same as government user CCR Tools functionality).

Create an Account

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.

Create System Account
Enter Personal / User Information

Create Account: Individual

Personal Information

Page Description
Please provide your personal information requested below.
Fields marked with an asterisk (*) are mandatory.

Title: Ms.
First Name*: Sam
Middle Initial: 
Last Name*: Webinar
Suffix: 
Email Address*: samwebinar01@gmail.com
Confirm Email Address*: samwebinar01@gmail.com
Phone*: (703)234-1234
Phone Extension: 
Fax: 
Address Line 1:
Address Line 2: 
City: 
State/Province: Please select a value
Country*: UNITED STATES
ZIP/Postal Code:

CANCEL

NEXT
Create Account:
Individual

Account Information

Page Description
Please enter the following information for your SAM account.

Username*:

Username Requirements
✓ Username length is valid

Warning: Once created, username cannot be changed in SAM.

Password*:

Confirm Password*:

Security Question 1*:

Security Answer 1*:

Security Question 2*:

Security Answer 2*:

Please select a v

Please select a v
Please enter the following information for your SAM account.

- **Username**: samwebiner01
- **Password**: ********
- **Confirm Password**: 
- **Security Question 1**: Please select a
- **Security Answer 1**: 
- **Security Question 2**: Please select a
- **Security Answer 2**: 

**Password Requirements**:
- Must be at least 8 characters in length
- Must contain at least 1 number
- Must contain at least 1 alphabet
- Must contain at least 1 special character
Enter Account Information (3 of 3)

Create Account: Individual

Account Information

Page Description
Please enter the following information for your SAM account.

Username*:

Password*:

Confirm Password*:

Security Question 1*:
Please select a value

Security Answer 1*:

Security Question 2*:

Security Answer 2*:

Warning: Once created, username cannot be changed in SAM.
Page Description
Please validate that the information below is correct. Once you submit, your account will be created and you will no longer be able to change the user name. Click 'Edit' in the appropriate section if you need to make changes before continuing.

Personal Information

Title: Ms.
First Name: Sam
Middle Initial: 
Last Name: Webinar
Suff: 
Email Address: samwebinaros@gmail.com
Phone: (703)234-1234
Phone Extension: 
Fax: 
Address Line 1: 
Address Line 2: 
City: 
State: 
Country: UNITED STATES
ZIP: 
Account Information

Username: samwebinar01
Password: ***********
Security Question 1: What did you name your first stuffed animal?
Security Answer 1: Hunny Bunny
Security Question 2: In what city did your nearest relative live in 2010?
Security Answer 2: Alexandria
Security Question 3: In what city or town did your parents meet?
Security Answer 3: Sydney

CANCEL  BACK  SUBMIT
Confirmation

Sat Feb 23 11:07:11 EST 2013

Congratulations -- Your SAM account has been created! But, you are not done. We just sent you an email to the email address you gave us so you can confirm your account creation. In the email, there is a link that you must click within next 48 hours to activate your account. For now, click on DONE to go back to the SAM Home page.
This email was sent by an automated administrator. Please do not reply to this message.

Thank you for registering in the U.S. federal government’s System for Award Management (SAM).

Your Username is: samwebinar01

Please note that this is only a confirmation of your Username. You must click on the link below, within 48 hours of receipt of this message, to verify your email address and complete the registration process. https://www.sam.gov/portal/public/SAM?activationCode=77gjmZ3QR341JP

You may also copy and paste the URL into your browser address line to go directly to the web page.
Please note that if this is your first login attempt, the system will default to the Migrate Legacy Account page where you will be prompted to indicate whether or not you wish to transfer your role(s) held in the legacy federal government systems (CCR.gov, FedReg.gov, ORCA.gov, and EPLS.gov) to your new SAM account.

IMPORTANT: If you do not have roles to migrate from a legacy system and/or you would like a new role assigned to your account, you will need to request that a role be assigned by your Administrator in order to have access to desired system functionality.

For assistance, please contact the Federal Service Desk at www.fsd.gov or by telephone at 866-606-8220 (toll free) or at 334-206-7828 (internationally).

Thank you,
The System for Award Management (SAM) Administrator
https://www.sam.gov/portal/public/SAM
Link Takes You to Login Page

Enter Username and Password

Please enter your Username and Password to login to SAM. If you do not remember your Username or Password, please use the respective Forgot Username? and Forgot Password? links provided below.

Username:
Forgot Username?
Password:
Forgot Password?
Login

Note to all Users: This is a Federal Government computer system. Use of this system constitutes consent to monitoring at all times.
Account Activated

Name: Ms. Sam Webinar

Account Activated - Confirmation

Confirmation

Sat Feb 23 11:00:26 EST 2013

Thank you for activating your SAM account! You will be taken to the User Dashboard page. Once on the User Dashboard, you will have the option to migrate an account from a legacy system. Use the Done button to continue.

Note to all Users: This is a Federal Government computer system. Use of this system constitutes consent to monitoring at all times.
Welcome, Sam Webinar

Would you like to migrate a legacy system account? [YES][HIDE MESSAGE]

Welcome to SAM!

Notice for all registered users:
The 2012 North American Industry Classification Standards (NAICS codes) are now active. As part of this change, the Small Business Administration (SBA) has been reviewing and updating its table of size standards. Size Standards changes have taken place on the following dates:
1. October 1, 2012
2. October 24, 2012

Impact to you:
1. The NAICS you selected in the Assertions section of your registration will not be affected and no action is needed at this time. However, the next time you update your record, you will be required to update the NAICS to ensure that they are in accordance with the 2012 list.
2. The NAICS lists to which you certified in your representations and certifications will be updated as follows:

If the description of the NAICS has been changed, you will now see the 2012 version of the description in the table. If the size standard itself has been changed, and this affects the "Yes" or "No" answer (Small or Other Than Small) on your NAICS tables at 52.210-1 and 52.212-2, SAM will place an exclamation point (!) next to the "Yes" or "No" answer to show that it should be reviewed. The next time you update your reps and cert the answers will be displayed as per the 2012 standards, so you can certify to those at that time, and the exclamation points will be removed.
Task 2

MIGRATE LEGACY ACCOUNT ROLES / PERMISSIONS
What do you mean by migrate?

- Your registration record from CCR is in SAM…that is the actual information about your entity (as represented by your DUNS number)

- You need to **connect** your new SAM individual user account to that registration record so you can manage it

- If you were the one who used to manage your registration record in CCR, and created your individual user account in SAM using the same e-mail address, SAM should recognize you

- If you were the one who used to manage your registration record in CCR but used a different e-mail address when you created your individual user account in SAM, you can search using your old e-mail address

- If the person who used to manage your registration record in CCR is no longer with your organization or if you don’t have access to the e-mail address you used, you need to contact the Federal Service Desk (FSD) at [www.fsd.gov](http://www.fsd.gov) or 866.606.8220 to get help accessing your registration record
Welcome, Sam Webinar

Would you like to migrate a legacy system account?

Welcome to SAM!

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2. The NAICS lists to which you certified in your representations and certifications will be updated as follows:

   If the description of the NAICS has been changed, you will now see the 2012 version of the description in the table.
   If the size standard itself has been changed, and this affects the “Yes” or “No” answer (Small or Other Than Small) on your NAICS tables at 52.219-1 and 52.212-3, SAM will place an exclamation point (!) next to the “Yes” or “No” answer to show that it should be reviewed. The next time you update your reps and certs the answers will be displayed as per the 2012 standards, so you can certify to those at that time, and the exclamation points will be removed.
Welcome, Sam Webinar

Would you like to migrate a legacy system account? **YES**  **NO** **HIDE MESSAGE**

Welcome to SAM!

**Notice for all registered users:**
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2. October 24, 2012

**Impact to you:**
1. The NAICS you selected in the Assertions section of your registration will not be affected and no action is needed at this time.
   However, the next time you update your record, you will be required to update the NAICS to ensure that they are in accordance with the 2012 list.
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   If the description of the NAICS has been changed, you will now see the 2012 version of the description in the table.
   If the size standard itself has been changed, and this affects the 'Yes' or 'No' answer (Small or Other Than Small) on your NAICS tables at 52.219-1 and 52.212-3, SAM will place an exclamation point (!) next to the 'Yes' or 'No' answer to show that it should be reviewed. The next time you update your reps and certs the answers will be displayed as per the 2012 standards, so you can certify to those at that time, and the exclamation points will be removed.
Select Legacy Systems

Please select the legacy systems for which you would like to migrate an account. The system will check if a legacy account in the selected system has the same email address as the one identified on your SAM account. You must have access to the email address that is tied to your legacy account to complete this process.

- Central Contractor Registration (CCR) / CCR Tools
- Federal Agency Registration (FedReg)
- Excluded Parties List System (EPLS)

ORCA and CCR records have been combined. To access your ORCA records, please migrate your 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: __________
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
- Account associated with: samwebinar01@gmail.com
  OR
- Enter Email Address: [blank]

PREVIOUS  NEXT
Submit the Account Migration

Migrate Legacy Account

- Select Legacy Systems
- Select Legacy Accounts
- Summary

Summary

Please validate the information below is correct before submitting. Use the **EDIT** button to make changes to the appropriate sections.

Legacy Accounts

- **System Name**: CCR
- **Username**: samwebinar01
- **Email Address**: samwebinar01@gmail.com

For legacy accounts that have the same email address as your SAM email address, no further action is required. The roles will be migrated upon using the **Submit** button.

For legacy accounts that DO NOT have the same email address as your SAM email address, you will need to validate you have access to that email address. An email will be sent to the legacy system email address upon using the **Submit** button. Please follow the instructions in the email to migrate the roles to your SAM account.

SUBMIT
Migrate Legacy Account

- Select Legacy Systems
- Select Legacy Accounts
- Summary

BACK TO USER DASHBOARD

Migrate Legacy Account

Confirmation

Thank you for validating email address associated with your legacy accounts. Roles and Permissions associated with the following legacy accounts have been migrated.

CCR
Use the Done button to continue.
Task 3
UPDATE YOUR ENTITY RECORD
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.

Create User Account

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.

Register/Update Entity

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.

Search Records

WHAT IS SAM?

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.

NEWS AND ANNOUNCEMENTS

SAM Management Moves to GSA FAS and CIO
Click on General Info and go to the

USER GUIDES/Helpful HINTS

Additional information, such as a full User Guide, Quick Start Guides, Helpful Hints, and Webinars are

FORMER CCR REGISTRANTS

If you had an active record in CCR, you have an active record in SAM. You do not need to do anything in SAM at this time, unless a change in your business circumstances requires updates to your Entity record(s) in order for
Welcome, Sam Webinar

Would you like to migrate a legacy system account?

Welcome to SAM:

Notice for all registered users:
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   b. The NAICS lists to which you certify in your representations and certifications will be updated as follows:

   - If the description of the NAICS has been changed, you will now see the 2012 version of the description in the table. If the size standard itself has been changed, and this affects the "Yes" or "No" answer (Small or Other Than Small) on your NAICS tables at 32.219-1 and 52.212-3, SAM will place an exclamation point (!) next to the "Yes" or "No" answer to show that it has been reviewed. The next time you update your reps and certs the answers will be displayed as per the 2012 standards, so
Welcome, Sam Webinar

Would you like to migrate a legacy system account?  

Welcome to SAM!

Notice for all registered users:
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Register Entity

Determine Purpose of Registration

Page Description
The system will guide you through the entity registration process based on the answers you provide below.

What type of entity are you? *

- Business or Organize

Do you wish to bid on contracts?

- No

Do you want to be eligible for grants and other federal assistance?

- Yes

Do you want to perform Intragovernmental Transactions (IGT)?

- Not Applicable

CANCEL

PREVIOUS
NEXT
Confirm Purpose

Page Description
Based on the answers provided on the previous page, SAM has determined your purpose for registering. If you need to make changes, please go back to the previous page. Use the Next button to continue with the Entity Registration process.

Purpose of Registration:
You are required to complete the following sections:
1. Core Data
2. Points of Contact

Federal Assistance Awards Only

CANCEL
PREVIOUS NEXT
DUNS Information

Gorman Manufacturing Company, Inc.
DUNS: 804735122  CAGE Code: 5AW07

Public Identifier:
DUNS Number: *  804735122

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 govt@dnb.com. International registrants email: samhelp@dnb.com

Name:
D&B Legal Business Name: *  Gorman Manufacturing C

DUNS Physical Address:
Please enter the physical address that D&B has on file for your entity. Your entity will not be activated if a mailing address is provided.
Address Line: *  402 Koller Street
**Verify DUNS Information**

**German Manufacturing Company, Inc.**

<table>
<thead>
<tr>
<th>Details Entered by the user</th>
<th>Details returned from D&amp;B</th>
</tr>
</thead>
<tbody>
<tr>
<td>DUNS: 804735132</td>
<td>DUNS: 804735132</td>
</tr>
<tr>
<td>Legal Business Name:</td>
<td>Legal Business Name: German Manufacturing Company, Inc.</td>
</tr>
<tr>
<td>(none)</td>
<td>(none)</td>
</tr>
<tr>
<td>Address Line 1: 402 Roller Street</td>
<td>Address Line 1: 402 Roller Street</td>
</tr>
<tr>
<td>Address Line 2:</td>
<td>Address Line 2:</td>
</tr>
<tr>
<td>City: San Francisco</td>
<td>City: San Francisco</td>
</tr>
<tr>
<td>State: CA</td>
<td>State: CA</td>
</tr>
<tr>
<td>ZIP/Postal Code: 94110</td>
<td>ZIP/Postal Code: 94110</td>
</tr>
<tr>
<td>Country: UNITED STATES</td>
<td>Country: UNITED STATES</td>
</tr>
</tbody>
</table>
**Business Information**

**German Manufacturing Company, Inc.**

- **DUNS**: 804733132
- **CAGE Code**: 5AW07

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**Note:** TIN (either EIN or SSN) is required. Only sole proprietors without a TIN should enter an SSN. Please note that the number entered here will be sent to the IRS with the TIN consent information below. It may take 3-5 days to return a TIN match from IRS.

**Business Information:**

- **Business Start Date (MM/DD/YYYY):** 03/09/2006
- **Fiscal Year End Close Date (MM/DD):** 12/31

**Company Division Name:**

**Company Division Number:**

**Corporate URL:**

**Congressional District:**

**Create/Enter MPIN:** A12345678

The MPIN will be shared with authorized partner applications (e.g., Grants.gov, Fast Performance Information Retrieval System (FPIRS) etc.). The MPIN acts as your password in these systems and you should guard it as such. The MPIN must be nine characters long and contain at least one letter, one number, and no spaces or special characters.

**Physical Address - San Francisco**

- **Address Type:** Physical
- **Address Line 1:** 400 Keller Street
- **City:** San Francisco
Executive Compensation Questions

Gorman Manufacturing Company, Inc.
DUNS: 804735182  CAGE Code: 5AW07

Page Description
Please enter the requested information below about your entity. You must provide data for the five (5) most highly compensated executives in your business or organization including parent organization.

Executive Compensation:
In your business or organization’s preceding completed fiscal year, did your business or organization (the legal entity to which this specific SAM record, represented by a DUNS number, belongs) receive both of the following:

1. 80 percent or more of your annual gross revenues in U.S. federal contracts, subcontracts, loans, grants, subgrants, and/or cooperative agreements and
2. $25,000,000 or more in annual gross revenues from U.S. federal contracts, subcontracts, loans, grants, subgrants, and/or cooperative agreements?

No

Does the public have access to information about the compensation of the senior executives in your business or organization (the legal entity to which this specific SAM record, represented by a DUNS number, belongs) through periodic reports filed under section 13(a) or 13(d) of the Securities Exchange Act of 1934 (15 U.S.C. 78m(a), 78o(d)) or section 6104 of the Internal Revenue Code of 1986?

Not Applicable

CANCELНЕВЕСТНИЕ
Core Data

<table>
<thead>
<tr>
<th>Category</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>DUNS Information</td>
<td>DUNS Number: 804733132</td>
</tr>
<tr>
<td>Business Information</td>
<td>D&amp;B Legal Business Name: German Manufacturing Company, Inc.</td>
</tr>
<tr>
<td>IRS Consent</td>
<td>Doing Business As: (none)</td>
</tr>
</tbody>
</table>

Business & TIN Information:

<table>
<thead>
<tr>
<th>Category</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>CAGE/NCAGE Code</td>
<td></td>
</tr>
<tr>
<td>General Information</td>
<td></td>
</tr>
<tr>
<td>Financial Information</td>
<td></td>
</tr>
<tr>
<td>Executive Compensation Questions</td>
<td></td>
</tr>
<tr>
<td>Proceedings Questions</td>
<td></td>
</tr>
<tr>
<td>Information Opt-Out</td>
<td></td>
</tr>
</tbody>
</table>
What happens next?

- You’ve submitted your update…congratulations! Now what?
- You should get an e-mail from SAM.gov acknowledging the update submission.
- Your registration then goes through the external validation process to the Internal Revenue Service (if applicable) and the Defense Logistics Agency’s Commercial And Government Entity (CAGE) code system.
- You should get an e-mail from SAM.gov:
  - When your registration passes the IRS validation, if applicable.*
  - If your registration fails the IRS validation with additional information.
  - If your record fails the CAGE validation. During the validation process, pay attention to any supplemental e-mail from @dla.mil as that will contain instructions from the CAGE team critical to passing CAGE validation.
  - When your registration update goes active. The expiration date is set 365 days from when you submitted the record, as that is the day you certified to the representations and certifications.

*Note: Once you move beyond the TIN Consent Form, in your update, your Taxpayer information would be sent to the IRS the next morning for validation. So, if you get partway through your registration/update, but do not finish, SAM will at least send the Taxpayer information to the IRS for validation. That way, when you do complete and submit your registration, it should only need to go for CAGE validation.
Make sure there is an answer selected for the "EDI" question, even if the answer is "No."

On the POC page, please pay attention to where the last name is located. This should not be on the same line as the first name. If it is, please delete the last name and retype on the correct line.

If you are updating a registration from CCR, make sure there aren’t Optional POCs hidden on the POC page. Expand and view/update any POCs you see listed.

If your CCR registration expired before Dec 2010 or if you do not have access to the email address on your CCR user account you will have to contact the Federal Service Desk to get access to your entity record.

- Please have the following information available about your legacy CCR record when you call: Last 4 digits of the TIN, Last 4 digits of the Bank Account number, Financial Institute (Bank) Name, Bank Account Type (Checking or Savings). You will also need to provide your SAM user name.
- SAM works best on Mozilla Firefox or Google Chrome. If you have access to one of these browsers to complete your registrations please use it instead of Internet Explorer.
  - If you are in Internet Explorer and you experience trouble on the SAM site, put the browser into *compatibility mode* by selecting (clicking) the icon in the address bar of the browser that looks like a broken or torn piece of paper.
  - The icon is located in-between the words General Services Administration [US] and the refresh button.
Please go through screen by screen from the beginning of the record. Do not jump around. After reviewing your data on each screen, select "Save & Continue" or "Next."

Be sure to submit your registration. You will receive a notification when the registration has been submitted. Data on your submitted record will not replace data in the active or expired record until it has passed external validations and received an Active status.

- You will receive a notification when your registration has been activated. Passing IRS validation does not mean you have an active record.

Your registration will not be available in external systems (ex: FBO or Grants.gov) until 24 hrs after the registration has been activated (i.e. you received the e-mail notification that you have an active registration in SAM). Do not confuse the successful submission notification with the activation notice.
For information about how to apply for an Employer Identification Number on-line, go to:

It’s free and relatively quick (approximately half an hour if you have your related business information) to apply for and get an EIN

However, it will take up to two weeks before your EIN becomes part of the IRS's permanent records. You must wait until this occurs before you can:
- File an electronic return
- Make an electronic payment
- Pass an IRS Taxpayer Identification Number (TIN) matching program

The IRS provides details Frequently Asked Questions at:

Once you’ve reviewed the instructional information, go to the IRS’ EIN Assistant to apply on-line for free:
Register Entity

- Grants.gov has step-by-step registration instructions
  - [http://www.grants.gov/applicants/organization_registration.jsp](http://www.grants.gov/applicants/organization_registration.jsp)

- From your SAM registration, you will need to know your
  - MPIN (found in Core Data / Business Information)

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</tbody>
</table>

Note: TIN (either EIN or SSN) is required. Only sole proprietors without a TIN should enter an SSN. Please note that the number entered here will be sent to the IRS with the TIN consent information below. It may take 3-5 days to return a TIN match from IRS.

**Business Information:**

- Business Start Date (MM/DD/YYYY): 06/29/2008
- Fiscal Year End Close Date (MM/DD): 12/31
- Company Division Name: 
- Company Division Number: 
- Corporate URL: 
- Congressional District: 
- Create/Enter MPIN: A12345678

The MPIN will be shared with authorized partner applications (e.g., Grants.gov, Past Performance Information Retrieval System (PPIRS), etc.). The MPIN acts as your password in these systems and you should guard it as such. The MPIN must be nine characters long and contain at least one letter, one number, and no spaces or special characters.

- Electronic Business POC (found in Points of Contact)
Summary

- Task Summary
  - Create a SAM User Account
  - Migrate Legacy Account Roles/Permissions
  - Update Your Entity Record

- Resources for Help:
  - FAQs
  - Quick User Guides
  - SAM User Guide
  - Helpful Hints

  - Search the Answer Center
  - Webform / Ask A Question
  - Operating Hours: Weekdays, 8 am – 8 pm, Eastern