

# System for Award Management (SAM)

- ▶ **WEBINAR: Updating Your Former CCR Entity Registration Record in SAM**

**May 15, 2013**

► **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.

- ▶ **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



USER NAME

PASSWORD

LOG IN

[Forgot Username?](#)[Forgot Password?](#)[Create an Account](#)

HOME

SEARCH RECORDS

DATA ACCESS

GENERAL INFO

HELP

## 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 FOUO 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 FOUO information.

[Search Records](#)

## WHAT IS SAM?

The **System for Award Management (SAM)** is a **Federal Government owned and operated** free web site that consolidates the capabilities in CCR/FedReg, ORCA, and EPLS. Future phases of SAM will add the capabilities of other systems used in Federal procurement and awards processes.

[Need Help?](#)

## NEWS AND ANNOUNCEMENTS

**SAM Management Moves to GSA FAS and CIO**

Click on General Info and go to the News and Announcements section for

## USER GUIDES/HELPFUL HINTS

Additional information, such as a full User Guide, Quick Start Guides, Helpful Hints, and Webinars are available on the HELP tab.

## 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 you to be paid or to receive an award or you need to renew your Entity(s)



USER NAME

PASSWORD

**LOG IN**[Forgot Username?](#)[Forgot Password?](#)[Create an Account](#)[HOME](#)[SEARCH RECORDS](#)[DATA ACCESS](#)[GENERAL INFO](#)[HELP](#)


## 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 FOUO 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.



Create Account: Individual	Personal Information	Content Glossary																																
<ul style="list-style-type: none"><li>Personal Information</li><li>Account Information</li><li>Summary</li></ul>	<div><b>Page Description</b> Please provide your personal information requested below. Fields marked with an asterisk (*) are mandatory.</div> <table><tr><td>Title :</td><td><input type="text" value="Ms."/></td></tr><tr><td>First Name* :</td><td><input type="text" value="Sam"/></td></tr><tr><td>Middle Initial :</td><td><input type="text"/></td></tr><tr><td>Last Name* :</td><td><input type="text" value="Webinar"/></td></tr><tr><td>Suffix :</td><td><input type="text"/></td></tr><tr><td>Email Address* :</td><td><input type="text" value="samwebinar01@gmail.com"/></td></tr><tr><td>Confirm Email Address* :</td><td><input type="text" value="samwebinar01@gmail.com"/></td></tr><tr><td>Phone* :</td><td><input type="text" value="(703)234-1234"/> (xxx)xxx-xxxx</td></tr><tr><td>Phone Extension :</td><td><input type="text"/></td></tr><tr><td>Fax :</td><td><input type="text"/> (xxx)xxx-xxxx</td></tr><tr><td>Address Line 1 :</td><td><input type="text"/></td></tr><tr><td>Address Line 2 :</td><td><input type="text"/></td></tr><tr><td>City :</td><td><input type="text"/></td></tr><tr><td>State/Province:</td><td><input type="text" value="Please select a value"/></td></tr><tr><td>Country*:</td><td><input type="text" value="UNITED STATES"/></td></tr><tr><td>ZIP/Postal Code:</td><td><input type="text"/> <input type="text"/></td></tr></table> <div><input type="button" value="CANCEL"/>  <input type="button" value="NEXT"/></div>	Title :	<input type="text" value="Ms."/>	First Name* :	<input type="text" value="Sam"/>	Middle Initial :	<input type="text"/>	Last Name* :	<input type="text" value="Webinar"/>	Suffix :	<input type="text"/>	Email Address* :	<input type="text" value="samwebinar01@gmail.com"/>	Confirm Email Address* :	<input type="text" value="samwebinar01@gmail.com"/>	Phone* :	<input type="text" value="(703)234-1234"/> (xxx)xxx-xxxx	Phone Extension :	<input type="text"/>	Fax :	<input type="text"/> (xxx)xxx-xxxx	Address Line 1 :	<input type="text"/>	Address Line 2 :	<input type="text"/>	City :	<input type="text"/>	State/Province:	<input type="text" value="Please select a value"/>	Country*:	<input type="text" value="UNITED STATES"/>	ZIP/Postal Code:	<input type="text"/> <input type="text"/>	<div>Content Glossary</div> <ul style="list-style-type: none"><li>Role</li><li>Reason for Request</li></ul>
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Last Name* :	<input type="text" value="Webinar"/>																																	
Suffix :	<input type="text"/>																																	
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Confirm Email Address* :	<input type="text" value="samwebinar01@gmail.com"/>																																	
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Country*:	<input type="text" value="UNITED STATES"/>																																	
ZIP/Postal Code:	<input type="text"/> <input type="text"/>																																	

Create Account:  
Individual

- › Personal Information
- › Account Information
- › Summary

**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\* :

## Content Glossary



Create Account:  
Individual

- › Personal Information
- › Account Information
- › Summary

## Account Information

## Page Description

Please enter the following information for your SAM account.

Username\* :

Warning: Once created, username cannot be changed:

Password\* :

Confirm Password\* :

Security Question 1\* :

Security Answer 1\* :

Security Question 2\* :

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

## Content Glossary





Create Account:  
Individual

- › Personal Information
- › Account Information
- › Summary

**Account Information**

## Page Description

Please enter the following information for your SAM account.

Username\* :

**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 value

In what city did you meet your spouse/significant other?

What did you name your first stuffed animal?

In what city or town did your parents meet?

What is the first name of the person that you first kissed?

In what city did your nearest relative live in 2010?

In what city or town was your first job (full time or part time)?

What is the name of a college you applied to but didn't attend?

Where were you when you first heard about 9/11?

## Content Glossary



Create Account:  
Individual

- › Personal Information
- › Account Information
- › Summary

**Summary**

## 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**

EDIT

Title :	Ms.
First Name :	Sam
Middle Initial :	
Last Name :	Webinar
Suffix :	
Email Address :	samwebinar01@gmail.com
Phone :	(703)234-1234
Phone Extension :	
Fax :	
Address Line 1 :	
Address Line 2 :	
City :	
State :	
Country :	UNITED STATES
ZIP :	

## Content Glossary



**Account Information**[EDIT](#)

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](#)

SAM | System for Award Management 1.0

IBM v1.732.20130222-1427  
WWW2

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



Create Account:  
Individual

- ▶ Personal Information
- ▶ Account Information
- ▶ Summary

## Create Account: Personal

## Account Created - Confirmation

## 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.

PRINT

SAVE

DONE

## Content Glossary

Status Indicators: 

Registration Purpose:

Entity Type:

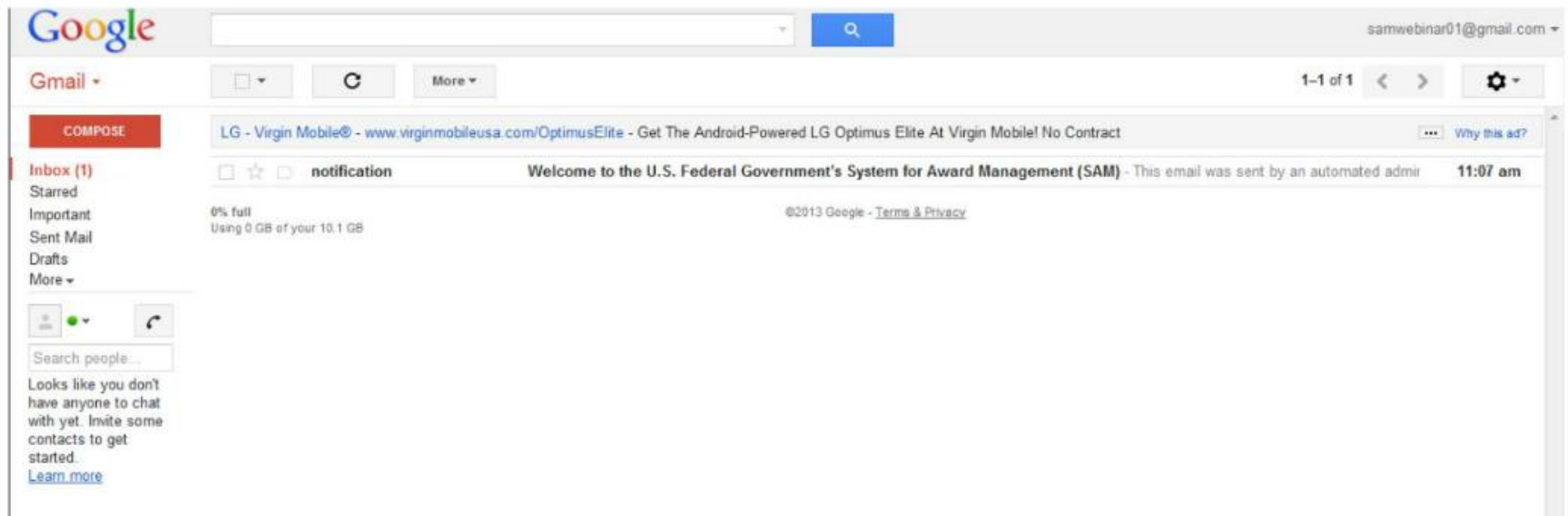
SAM | System for Award Management 1.0

IBM v1.732.20130222-1427

WWW2

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Google

Gmail

COMPOSE

Inbox (1)

Starred

Important

Sent Mail

Drafts

More

0% full  
Using 0 GB of your 10.1 GB

notification

LG - Virgin Mobile® - [www.virginmobileusa.com/OptimusElite](http://www.virginmobileusa.com/OptimusElite) - Get The Android-Powered LG Optimus Elite At Virgin Mobile! No Contract

... Why this ad?

Welcome to the U.S. Federal Government's System for Award Management (SAM) - This email was sent by an automated admin

11:07 am

©2013 Google - [Terms & Privacy](#)

Search people...

Looks like you don't have anyone to chat with yet. Invite some contacts to get started.

[Learn more](#)





notification@sam.gov

11:07 AM (0 minutes ago) ☆



to me ▾

*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=77gjmZ8OR341JP>

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](http://www.fsd.gov) or by telephone at [866-606-8220](tel:866-606-8220) (toll free) or at [334-206-7828](tel:334-206-7828) (internationally).

Thank you,

The System for Award Management (SAM) Administrator

<https://www.sam.gov/portal/public/SAM>

  
SYSTEM FOR AWARD MANAGEMENT

USER NAME

PASSWORD

LOG IN

[Forgot Username?](#)

[Forgot Password?](#)

[Create an Account](#)

HOME | SEARCH RECORDS | DATA ACCESS | GENERAL INFO | HELP

Login

Enter Username and Password

Login

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


SAM | System for Award Management 1.0

IBM v1.732.20130222-1427  
WWW2

Note to all Users: This is a Federal Government computer system.  
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GSA







USER NAME

[Forgot Username?](#)

PASSWORD

[Forgot Password?](#)[LOG IN](#)[Create an Account](#)[HOME](#)[SEARCH RECORDS](#)[DATA ACCESS](#)[GENERAL INFO](#)[HELP](#)**Name: Ms.Sam Webinar**

Account Activated - Confirmation

Confirmation

Sat Feb 23 11:09:26 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.

[PRINT](#)[SAVE](#)[DONE](#)

SAM | System for Award Management 1.0

IBM v1.732.20130222-1427

WWW2

**Note to all Users:** This is a Federal Government computer system.  
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Sam Webinar

[LOGOUT](#)[MY SAM](#)[SEARCH RECORDS](#)[DATA ACCESS](#)[GENERAL INFO](#)[HELP](#)**MY SAM**[Manage My User Roles](#)[Register/Update Entity](#)[Account Settings](#)[Data Access](#)[General](#)**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
3. January 7, 2013

**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 52.219-1 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.



## Task 2

# **MIGRATE LEGACY ACCOUNT ROLES / PERMISSIONS**



- ▶ 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



Sam Webinar

[LOGOUT](#)[MY SAM](#)[SEARCH RECORDS](#)[DATA ACCESS](#)[GENERAL INFO](#)[HELP](#)

## MY SAM

[Manage My User Roles](#)[Register/Update Entity](#)[Account Settings](#)[Data Access](#)[General](#)

## Welcome, Sam Webinar

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Sam Webinar

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## MY SAM

[Manage My User Roles](#)[Register/Update Entity](#)[Account Settings](#)[Data Access](#)[General](#)

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SYSTEM FOR AWARD MANAGEMENT

Sam Webinar  
[LOGOUT](#)

MY SAM | SEARCH RECORDS | DATA ACCESS | GENERAL INFO | HELP

Migrate Legacy Account

[Select Legacy Systems](#)  
[Select Legacy Accounts](#)  
[Summary](#)

[BACK TO USER DASHBOARD](#)

### Select Legacy Systems

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.

[NEXT](#)





Sam Webinar

LOGOUT

MY SAM

SEARCH RECORDS

DATA ACCESS

GENERAL INFO

HELP



## Migrate Legacy Account

- › [Select Legacy Systems](#)
- › [Select Legacy Accounts](#)
- › [Summary](#)

[BACK TO USER DASHBOARD](#)**Select Legacy Accounts****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:

[PREVIOUS](#)[NEXT](#)



## Migrate Legacy Account

- [Select Legacy Systems](#)
- [Select Legacy Accounts](#)
- [Summary](#)

[BACK TO USER DASHBOARD](#)**Select Legacy Accounts**

## 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:

[PREVIOUS](#)[NEXT](#)

## Migrate Legacy Account

- ▶ Select Legacy Systems
- ▶ Select Legacy Accounts
- ▶ Summary

[BACK TO USER DASHBOARD](#)

## Summary

## Summary

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

## Legacy Accounts

[EDIT](#)

**System Name :** CCR

**Username :** samwebinaro1

**Email Address :** samwebinaro1@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.

 [DONE](#)

## Task 3

# UPDATE YOUR ENTITY RECORD



USER NAME

PASSWORD

sa

LOG IN

[Forgot Username](#)[Forgot Password?](#)[Create an Account](#)[HOME](#)[SEARCH RECORDS](#)[DATA ACCESS](#)[GENERAL INFO](#)[HELP](#)

#### CREATE USER ACCOUNT

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[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

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[Search Records](#)

#### WHAT IS SAM?

[Need Help?](#)

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





Sam Webinar

LOGOUT

MY SAM

SEARCH RECORDS

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## MY SAM

Manage My User Roles

Manage Entity Users

Register/Update Entity

Account Settings

Data Access

General

## Welcome, Sam Webinar

Would you like to migrate a legacy system account?

YES

HIDE MESSAGE

Welcome to SAM!

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Sam Webinar

LOGOUT

MY SAM

SEARCH RECORDS

DATA ACCESS

GENERAL INFO

HELP



## MY SAM

Manage My User Roles

Manage Entity Users

Register/Update Entity

Complete Registrations

Incomplete Registrations

Inactive Registrations

Register New Entity

Service Contract  
Inventory

Account Settings

Data Access

General

## 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
3. January 7, 2013

## 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 52.219-1 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

- Register/Update Entity
- Complete Registrations
- Incomplete Registrations
- Inactive Registrations
- Register New Entity
- Service Contract Inventory
- Account Settings
- Data Access
- General

entity in SAM, please select the Register New Entity link..

Search for an Entity

Legal Business Name:

DUNS:

DoDAAC:

Office Code:

SEARCH

CLEAR

Entity List
<div><div></div>Gorman Manufacturing Company, Inc.</div>

Registration Details

- Department Code
- Agency Code
- Node Code
- Node Type
- Node Status
- Hierarchy Comment
- DUNS
- DoDAAC
- Entity Address
- Entity City
- Entity State
- Entity Foreign Province Code
- Entity Country
- Entity ZIP Code



- Register/Update Entity
  - Complete Registrations
  - Incomplete Registrations
  - Inactive Registrations
  - Register New Entity
  - Service Contract Inventory
- Account Settings
- Data Access
- General

entity in SAM, please select the Register New Entity link..

Search for an Entity

Legal Business Name:


DUNS:

DoDAAC:

Office Code:

SEARCH CLEAR

- Department Code
- Agency Code
- Node Code
- Node Type
- Node Status
- Hierarchy
- Comment
- DUNS
- DoDAAC
- Entity Address
- Entity City
- Entity State
- Entity Foreign
- Province Code
- Entity Country
- Entity ZIP Code

Entity List
 <b>Gorman Manufacturing Company, Inc.</b>

Registration Details
<b>Entity Name: Gorman Manufacturing Company, Inc.</b>
<b>Entity Details</b>
DUNS Number: 804735132
Address Line 1: 492 Koller Street
Address Line 2:
City: San Francisco
State / Province: CA
Country: UNITED STATES
ZIP/Postal Code: 94110
Registration Status: Active

UPDATE ENTITY DEACTIVATE VIEW



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MY SAM SEARCH RECORDS DATA ACCESS GENERAL INFO HELP

## MY SAM

- Manage My User Roles
- Manage Entity Users
- Register/Update Entity
- Account Settings
- Data Access
- General

### Update Purpose of Registration

Gorman Manufacturing Company, Inc.

DUNS: 804735132 CAGE Code: 5AW07

#### Page Description

The system will guide you through the entity update process based on the answer you provide below.

Do you want to update the Purpose of Registration? \*

Please select a value  
Please select a value  
Yes  
No

CANCEL

NEXT

## Content Glossary

Status Indicators: [icon]

SAM | System for Award Management 1.0

IBM v1.863.20130412-1616  
StagingPortal

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







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MY SAM SEARCH RECORDS DATA ACCESS GENERAL INFO HELP

- Register Entity
  - Registration Overview
  - Purpose of Registration
    - Determine Purpose
    - Confirm Purpose
  - Core Data
  - Assertions
  - Representations and Certifications
  - Points of Contact
  - Small Business Certification
  - Submit Certification
- BACK TO USER DASHBOARD

Determine Purpose of RegistrationGorman Manufacturing Company, Inc.  
DUNS: 804735132 CAGE Code: 5AW07

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 Organiza

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

Content Glossary

Status Indicators:

Registration Purpose:

Entity Type:



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- Register Entity
- Registration Overview
- Purpose of Registration
- Determine Purpose
- Confirm Purpose
- Core Data
- Points of Contact
- Submit Certification
- BACK TO USER DASHBOARD

Confirm Purpose

Gorman Manufacturing Company, Inc.

DUNS: 804735132 CAGE Code: 5AW07

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:

Federal Assistance Awards Only

You are required to complete the following sections:

1. Core Data

2. Points of Contact

CANCEL

PREVIOUS

NEXT

- Content Glossary
- Status Indicators:



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## Register Entity

Registration Overview

Purpose of Registration

Core Data

DUNS Information

Verify DUNS  
Information

Business Information

IRS Consent

CAGE or NCAGE Code

General Information

Financial Information

Executive  
Compensation  
Questions

## DUNS Information

Gorman Manufacturing Company, Inc.

DUNS: 804735132 CAGE Code: 5AW07

## Page Description

Enter DUNS Information for your entity.

## Public Identifier:

DUNS Number: \*

804735132

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](mailto:govt@dnb.com). International registrants  
email: [samhelp@dnb.com](mailto:samhelp@dnb.com)

## Name:

D&amp;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: \*

492 Koller Street

## Content Glossary

Status Indicators:

Core Data:

DUNS/DoDAAC:

Name:

Address:

## Register Entity

Registration Overview

Purpose of Registration

Core Data

DUNS Information

Verify DUNS Information

Business Information

IRS Consent

CAGE or NCAGE Code

General Information

Financial Information

Executive Compensation Questions

Proceedings Questions

Proceedings Details

Information Opt-Out

Review Core Data

Continue to Next

Section

### Verify DUNS Information

Gorman Manufacturing Company, Inc.

DUNS: 804735132 CAGE Code: 5AW07

#### Page Description

Please review the information retrieved from Dun & Bradstreet (D&B) for accuracy. If you click "Save & Continue," the information from D&B will appear in your entity's registration. If the information returned is incorrect, please click "Cancel" and make the necessary updates in D&B.

If you've received confirmation from D&B that your requested updates were completed over 24 hours ago, and that information is not yet displayed under "Details returned from D&B", click the button to refresh your data.

REFRESH D&B DATA

#### Details Entered by the user

DUNS: 804735132  
Legal Business Name: Gorman Manufacturing Company, Inc.  
Doing Business As: (none)  
Address Line 1: 492 Koller Street  
Address Line 2:  
City: San Francisco  
State: CA  
ZIP/Postal Code: 94110  
Country: UNITED STATES

CANCEL

#### Details returned from D&B

DUNS: 804735132  
Legal Business Name: Gorman Manufacturing Company, Inc.  
Doing Business As: (none)  
Address Line 1: 492 Koller Street  
Address Line 2:  
City: San Francisco  
State: CA  
ZIP/Postal Code: 94110  
Country: UNITED STATES

PREVIOUS

SAVE AND CONFIRM

## Content Glossary

Core Data:

DUNS/DoDAAC:

Name:

Address:



## Register Entity

## Registration Overview

## Purpose of Registration

## Core Data

✓ DUNS Information

✓ Verify DUNS Information

→ **Business Information**

● IRS Consent

● CAGE or NCAGE Code

● General Information

● Financial Information

● Executive Compensation Questions

● Proceedings Questions

● Proceedings Details

● Information Opt-Out

● Review Core Data

## Business Information

Gorman Manufacturing Company, Inc.

DUNS: 804735132 CAGE Code: 5AW07

**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): \*

03/29/2008

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.

## Physical Address - San Francisco

Address Type:

Physical

Address Line 1:

492 Koller Street

Address Line 2:

City:

San Francisco

## Content Glossary

**Business Information:**

## Business Start Date

Enter the date the business was formed or established here. This date is used to distinguish you from others with similar names. You must enter the date as mm/dd/yyyy (example: 01/01/1995).

## Fiscal Year End Close Date

Enter the day on which your business closes the fiscal year. For example, if you use the calendar year, enter 12/31. When entering the information on the web site, you must enter as mm/dd.





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## Register Entity

Registration Overview

Purpose of Registration

## Core Data

- ✓ DUNS Information
- ✓ Verify DUNS Information
- ✓ Business Information
- ✓ IRS Consent
- **CAGE or NCAGE Code**
- General Information
- Financial Information
- Executive Compensation
- Questions

## CAGE Code

Gorman Manufacturing Company, Inc.

DUNS: 804735132 CAGE Code: 5AW07

## Page Description

Please enter your CAGE below. If you do not have an existing CAGE Code, one will be assigned during the processing of your registration.

Does your entity already have a CAGE Code? \* Yes

CAGE :

5AW07

[Search CAGE Code](#)

CANCEL

PREVIOUS

SAVE AND CONTINUE

## Content Glossary

CAGE/NCAGE: A small icon of a speech bubble with a question mark inside, typically used for help or glossary links.

## Register Entity

Instructions and Help

Purpose of Registration

## Core Data

- ✓ DUNS Information
- ✓ Verify DUNS Information
- ✓ Business Information
- ✓ IRS Consent
- ✓ CAGE or NCAE Code
- ✓ General Information
- ✓ Financial Information
- **Executive Compensation Questions**
- Proceedings Questions
- Proceedings Details
- Information Opt-Out
- Review Core Data
- Continue to Next

## Executive Compensation Questions

Gorman Manufacturing Company, Inc.

DUNS: 804735132 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 15(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

CANCEL

PREVIOUS

SAVE AND CONTINUE

## Content Glossary

Executive Compensation:

## Core Data

- ✓ DUNS Information
- ✓ Verify DUNS Information
- ✓ Business Information
- ✓ IRS Consent
- ✓ CAGE or NCAGE Code
- ✓ General Information
- ✓ Financial Information
- ✓ Executive Compensation Questions
- ✓ Proceedings Questions
- ✓ Information Opt-Out
- ➔ **Review Core Data**
- Continue to Next Section

Points of Contact

Submit Certification

[BACK TO USER DASHBOARD](#)

below is correct before continuing. Use the EDIT button to make changes to the appropriate sections. If you are satisfied with the information entered previously, please click SAVE AND CONTINUE.

DUNS Number: 804735132  
D&B Legal Business Name: Gorman Manufacturing Company, Inc.  
Doing Business As: (none)

[\[Expand All\]](#) | [\[Collapse All\]](#)**Business & TIN Information:****CAGE/NCAGE Code****General Information****Financial Information****Executive Compensation Questions****Proceedings Questions****Information Opt-Out**[CANCEL](#)[PREVIOUS](#)[SAVE AND CONTINUE](#)

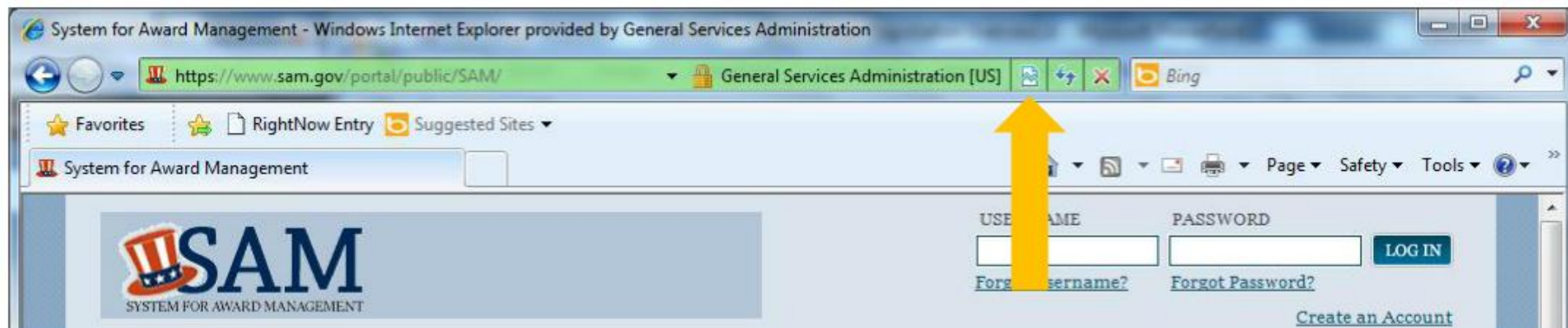
- ▶ You've submitted your update...congratulations! Now what?
- ▶ You should get an e-mail from SAM.gov acknowledging the update submission.
- ▶ Your registration then goes through the external validation process to the Internal Revenue Service (if applicable) and the Defense Logistics Agency's Commercial 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:**
  - [http://www.irs.gov/Businesses/Small-Businesses-&Self-Employed/Apply-for-an-Employer-Identification-Number-\(EIN\)-Online](http://www.irs.gov/Businesses/Small-Businesses-&Self-Employed/Apply-for-an-Employer-Identification-Number-(EIN)-Online)
- ▶ **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:**
  - <http://www.irs.gov/Businesses/Small-Businesses-&Self-Employed/Online-EIN:--Frequently-Asked-Questions>
- ▶ **Once you've reviewed the instructional information, go to the IRS' EIN Assistant to apply on-line for free:**
  - <https://sa1.www4.irs.gov/modiein/individual/index.jsp>



- ▶ 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)

Register Entity	Business Information	Gorman Manufacturing Company, Inc.
Registration Overview		DUNS: 804735132 CAGE Code: 5AW07
Purpose of Registration	<p><b>Note:</b> 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.</p>	
<b>Core Data</b>		
✓ DUNS Information		
✓ Verify DUNS Information		
→ <b>Business Information</b>		
● IRS Consent		
● CAGE or NCAGE Code		
● General Information		
● Financial Information		
● Executive Compensation		
	<p><b>Business Information:</b></p> <p>Business Start Date (MM/DD/YYYY): * <input type="text" value="03/29/2008"/></p> <p>Fiscal Year End Close Date (MM/DD): * <input type="text" value="12/31"/></p> <p>Company Division Name: <input type="text"/></p> <p>Company Division Number: <input type="text"/></p> <p>Corporate URL: <input type="text"/></p> <p>Congressional District: <input type="text"/></p> <p>Create/Enter MPIN: * <input type="text" value="A12345678"/></p> <p>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.</p>	

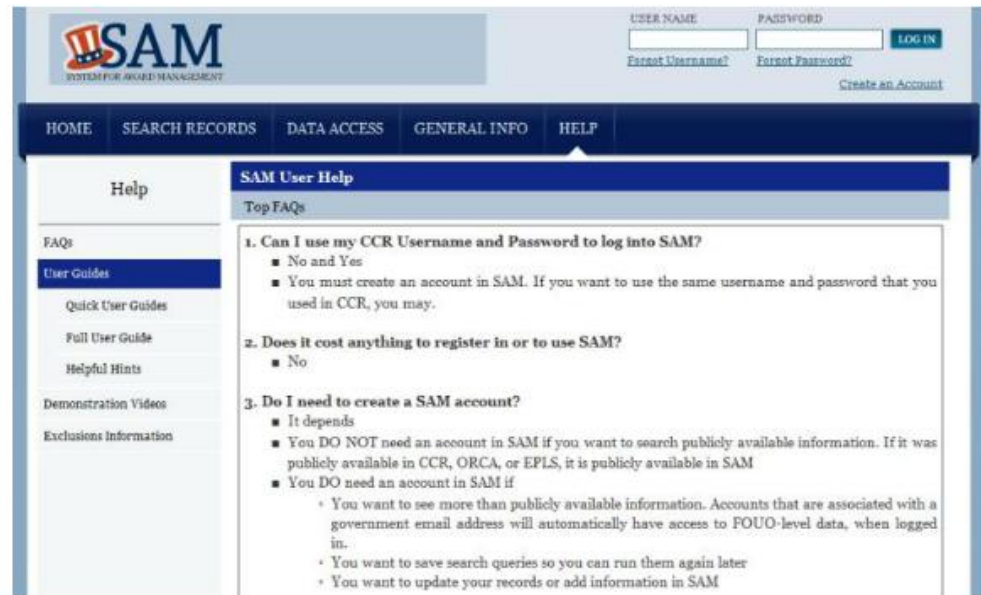
- Electronic Business POC (found in Points of Contact)

## ► 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



- Federal Service Desk: [www.fsd.gov](http://www.fsd.gov)
  - Search the Answer Center
  - Webform / Ask A Question
  - Operating Hours: Weekdays, 8 am – 8 pm, Eastern