SAM.gov Integration Updates and Demo Council on Government Relations
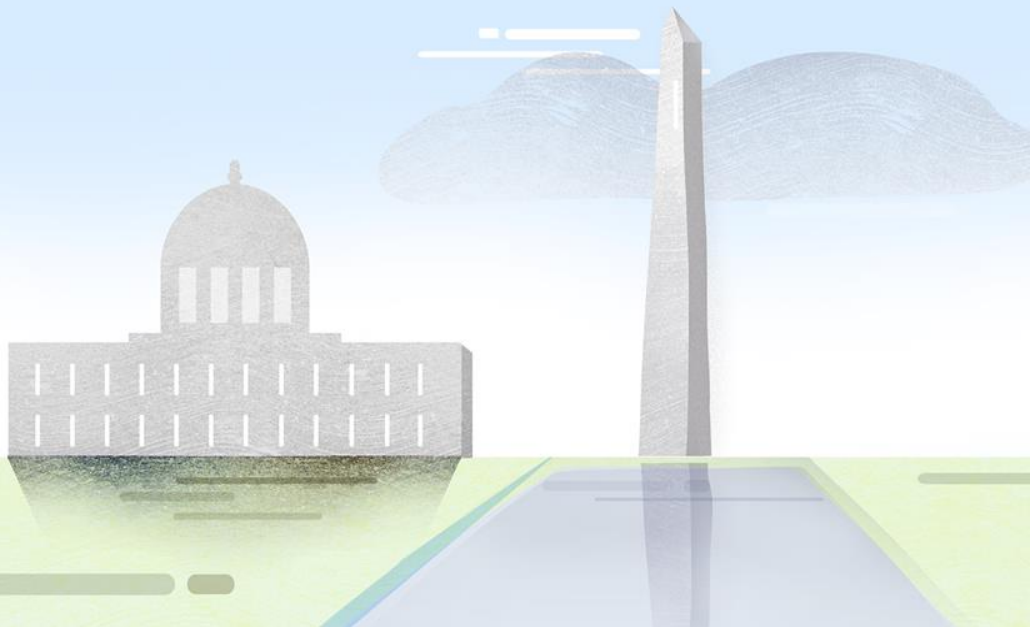
Katherine Rollins
Product Owner

Christy Hermansen
Design Lead

March 16, 2021

What is IAE?

The Integrated Award Environment (IAE) is a government-wide initiative administered by GSA's Federal Acquisition Service (FAS) within the Office of Systems Management (OSM).

- **Reducing barriers** for doing business with the government

- Increasing **transparency** into federal spending

- Increasing **accountability** in the award process

- **Reducing reporting burden**

- Increasing data **quality** and **integrity**

We **facilitate** the federal awards process through multiple online systems that each play a role in the awards lifecycle.

Our systems are used for registering to do business with the federal government, performance reporting, publicizing contract opportunities, collecting contract data, and more.

IAE Delivers the Framework for Conducting Government Business

What are the IAE Systems*?

- **beta.SAM.gov**
- Contractor Performance Assessment Reporting System **(CPARS)**
- Electronic Subcontracting Reporting System **(eSRS)**
- Federal Awardee Performance and Integrity Information System **(FAPIIS)**
- Federal Funding Accountability and Transparency Act (FFATA) Subaward Reporting System **(FSRS)**
- Federal Procurement Data System **(FPDS)**
- System for Award Management **(SAM)**

IAE also manages the Federal Service Desk

IAE Program Scale FY20

- $1.1+ trillion federal awards annually
- 68+ million monthly searches
- 5+ million monthly transactions
- 1.8+ million monthly users
- 650,000+ entities registered in SAM

SAM.gov Integration Updates and Demo

System for Award Management | For People Who Make, Receive, and Manage Federal Awards
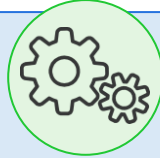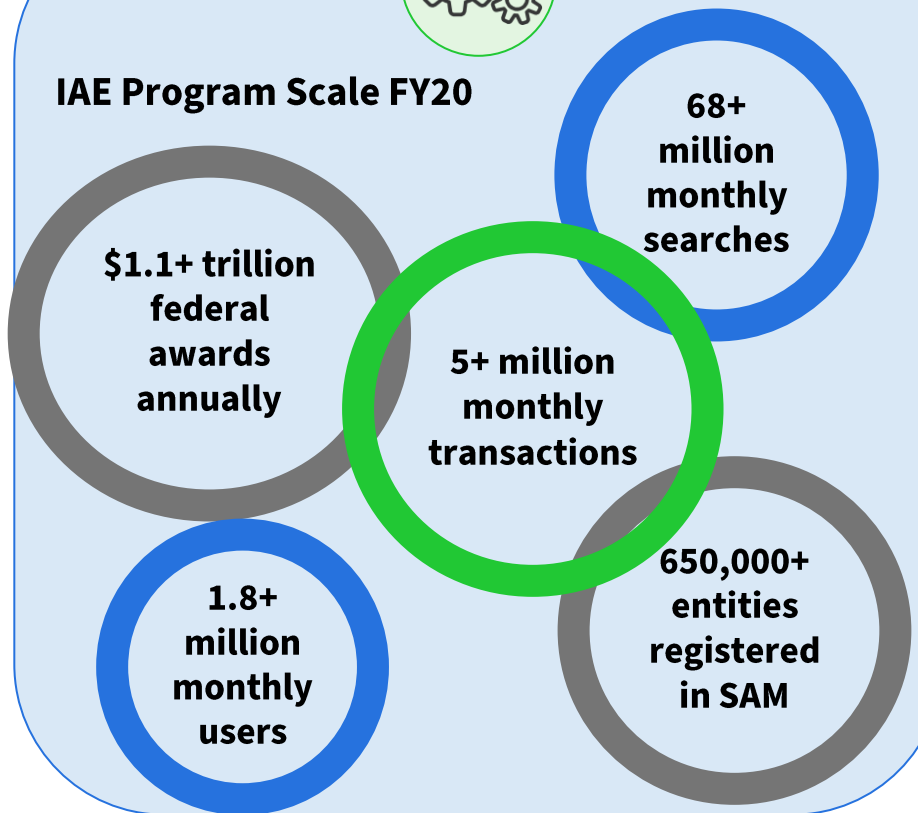
IAE Systems Modernization: Goals

By consolidating federal award systems, IAE can continually improve, update, and expand services based on user needs. We are implementing the latest secure technologies, positioning federal award systems to be streamlined and flexible for the long term.

We will achieve this by providing:

- **Search that Works**

- **Flexible Reporting**

- **Data you can Trust**

- **People-Focused Tools**

- **Agile Development**

IAE Systems Modernization: Status

The following legacy systems have been decommissioned and their functionalities **successfully transitioned to beta.SAM.gov** or another system:

- **Assistance Listings** (CFDA.gov)

- **Contract Opportunities** (FBO.gov)

- **Contract Data Reports** (FPDS.gov—Reports Only)

- **Wage Determinations** (WDOL.gov)

- PPIRS.gov → merged with CPARS
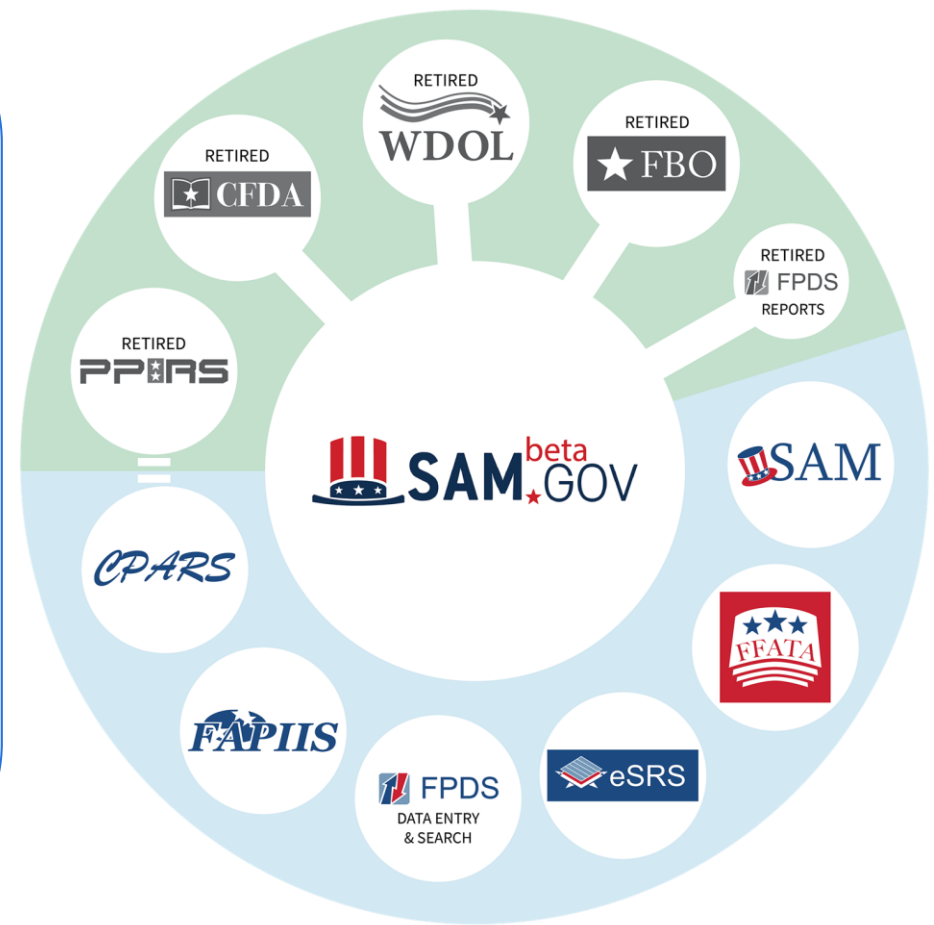
IAE Systems Modernization: Today

- Supports more than **300,000** registered users creating and searching for records

- Hosts **91,000+** active notices advertising contract opportunities to the public

- Hosts **2,270** active assistance listings representing the publicly available programs under which federal assistance is awarded
  - Posted Assistance Listing Annual Catalogue https://beta.sam.gov/help/assistance-listing

- Offers **6,100+** wage determinations to help contracting officials find accurate wage rates

- Produces a **twice-weekly** report on government-wide COVID-19 procurement award data
  - https://beta.sam.gov/reports/awards/static
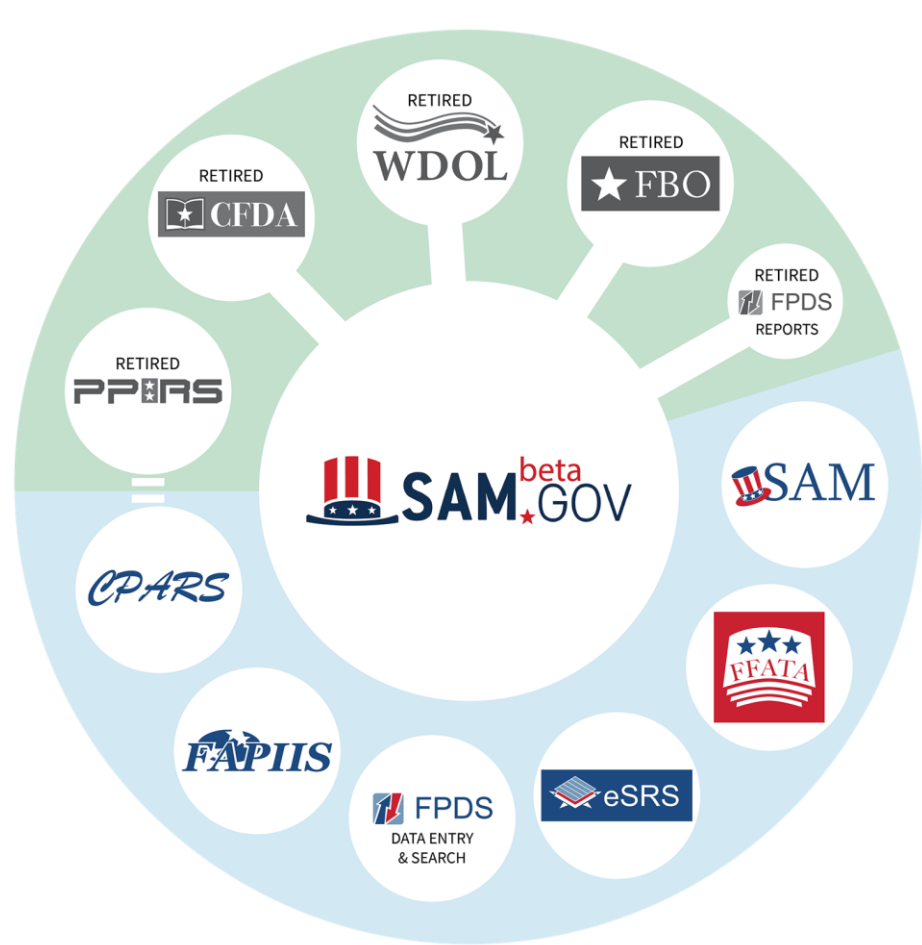
SAM.gov Integration Updates and Demo

System for Award Management | For People Who Make, Receive, and Manage Federal Awards

IAE Systems Modernization: What's Next?

LEGACY SITE DECOMMISSION STATUS
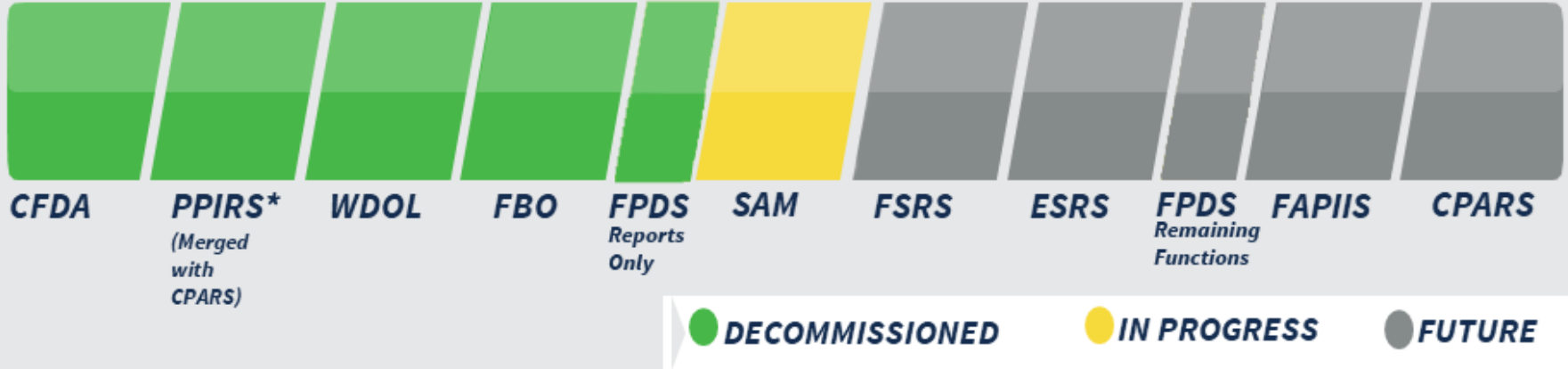
CFDA | PPIRS* (Merged with CPARS) | WDOL | FBO | FPDS Reports Only | SAM | FSRS | ESRS | FPDS Remaining Functions | FAPIIS | CPARS

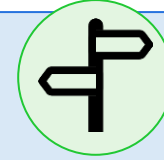● DECOMMISSIONED   ● IN PROGRESS   ● FUTURE

SAM.gov Integration Updates and Demo

System for Award Management | For People Who Make, Receive, and Manage Federal Awards

New design to be launched to beta.SAM.gov on **April 26, 2021**

SAM.gov will integrate with beta.SAM.gov on **May 24, 2021**.

IAE Systems Modernization: What's Next?

Currently, there are two sites with very similar names:

SAM.gov and **beta.SAM.gov**.

What is known today as beta.SAM.gov will become the new SAM.gov and will offer a single login to navigate the federal award lifecycle.

The system is called "beta.SAM.gov" not because it is a traditional beta system, but rather so that it can be differentiated from the current SAM.gov.

New design to be launched to beta.SAM.gov on **April 26, 2021**

SAM.gov will integrate with beta.SAM.gov on **May 24, 2021**.
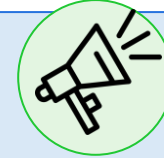
The resultant SAM.gov will be authoritative for:

- Entity Registrations

- Exclusions

- Service Contract Reporting

- BioPreferred Reporting

- Assistance Listings (formerly CFDA.gov)

- Wage Determinations (formerly WDOL.gov)

- Contract Opportunities (formerly FBO.gov)

- Contract Data Reports (formerly accessed via FPDS.gov)

SAM.gov Integration: New design deploys to beta.SAM.gov on April 26, 2021

What will change in beta.SAM.gov:

- New integrated homepage links to all existing services and domains

- New domain landing pages with related help and user orientation to related tasks

- Improved usability and layout for search results and data

What will NOT change in beta.SAM.gov:

- Workspace

- Profile

- Databank (Reports)

- Data Services

- Search functionalities

SAM.gov Integration Updates and Demo

SAM.gov Integration: SAM.gov functionality integrates with beta.SAM.gov on May 24, 2021

What will change:

- Single user URL (no more "beta") and login for all functions currently in beta.SAM.gov and SAM.gov

- Single user workspace personalized based on your roles and on the entities you manage

- Searching entity registration data will require users to sign in

- Landing pages with help specific to entity registrations, exclusions, and entity reporting

- SCR and BioPreferred reporting will be in the Workspace

- Roles and permissions streamlined

- Non-federal users can use system account functionalities

- Identity verification for entity administrators (optional until FY22)

SAM.gov Integration Updates and Demo

SAM.gov Integration: SAM.gov functionality integrates with beta.SAM.gov on May 24, 2021

What will NOT change:

- Entity registration process or requirements

- Registration data entry pages

- Searching exclusions or the Disaster Response Registry

- Searching other domains
  - Contract opportunities
  - Wage determinations
  - Assistance listings
  - Federal hierarchy
  - Contract data reports

The following information will migrate from legacy SAM.gov with **no action needed from entities or users**:

- Entity registration and exclusions data

- SAM user roles

- Service Contract reporting data

- BioPreferred reporting data

SAM.gov Integration Updates and Demo

SAM.gov Integration: SAM.gov functionality integrates with beta.SAM.gov on May 24, 2021
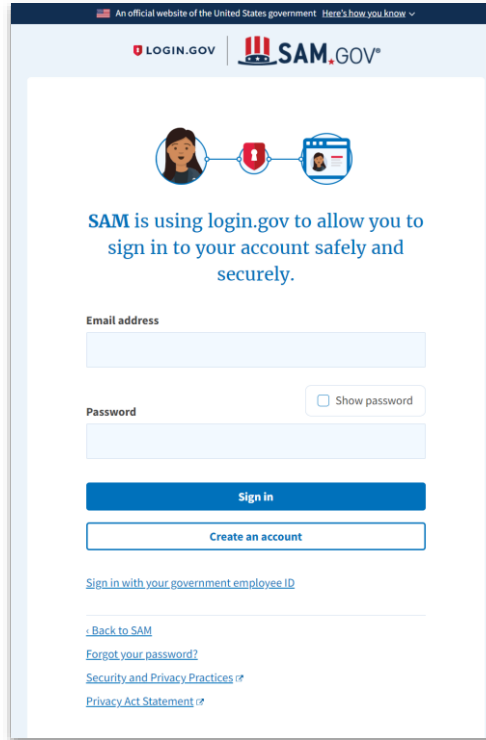
Why are we changing?

- New design implements and complies with the 21st Century Integrated Digital Experience Act and GSA Guidelines for Digital Presence

- Protecting accounts and improving fraud prevention with identity verification for entity administrators
  - Optional at SAM integration, required in FY22 Q1

- Single sign on and single workspace across all domains and services

- Help resources will be easier to find

- **Incorporates feedback from our users**
  - Focus groups, workshops, interviews, online feedback tool, service desk issues, and digital analytics

SAM.gov Integration Updates and Demo

SAM.gov Integration: Login

Single URL and login for all functions currently in beta.SAM.gov and SAM.gov

Use the same login.gov credentials. Your roles and data will transfer from the legacy SAM.gov to the modernized environment.

SAM.gov Integration Updates and Demo

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14

Workspace

- When you create a user account, there is a single page where you can find your profile and all your activities. We call it your Workspace.

- Access your saved searches, notifications, pending requests, drafts, actions, and more from here.

- Profile details and roles can all be accessed from here.

SAM.gov Integration: Workspace

Single user workspace personalized based on roles and on entities you manage

SAM.gov Integration Updates and Demo

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SAM.gov Integration: Workspace

Single user workspace personalized based on roles and on entities you manage

SAM.gov Integration Updates and Demo

SAM.gov Integration: Service Contract and BioPreferred Reporting

SCR and BioPreferred reporting will be in the Workspace

SAM.gov Integration Updates and Demo

SAM.gov Integration: Searching entity registrations

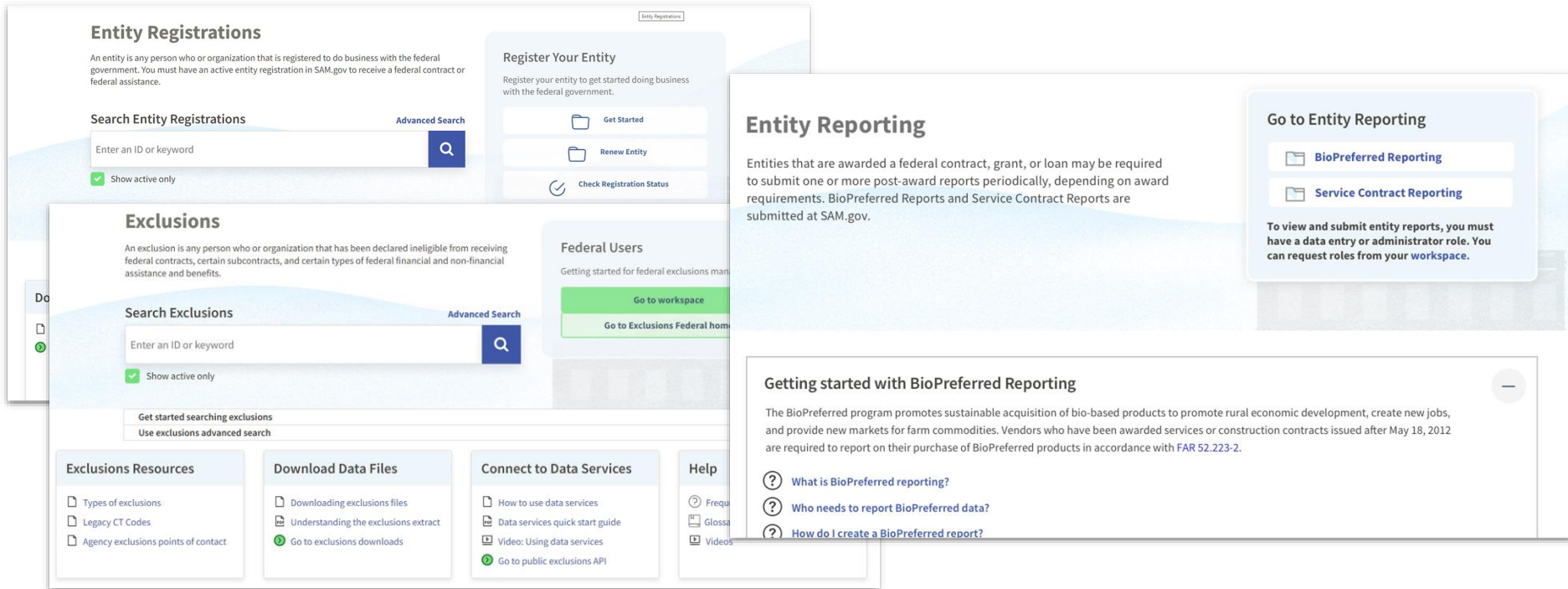**Searching entity registration data to require user authentication**

Entity Registrations are still public, but you must be signed in to search them

SAM.gov Integration Updates and Demo

SAM.gov Integration: Entity landing pages

Landing pages with help specific to entity registrations, exclusions, and reporting

Entity Registrations

An entity is any person who or organization that is registered to do business with the federal government. You must have an active entity registration in SAM.gov to receive a federal contract or federal assistance.

Search Entity Registrations   Advanced Search

[Enter an ID or keyword   🔍]

☑ Show active only

Register Your Entity

Register your entity to get started doing business with the federal government.

📁	Get Started
📁	Renew Entity
✔	Check Registration Status

Exclusions

An exclusion is any person who or organization that has been declared ineligible from receiving federal contracts, certain subcontracts, and certain types of federal financial and non-financial assistance and benefits.

Search Exclusions   Advanced Search

[Enter an ID or keyword   🔍]

☑ Show active only

Federal Users

Getting started for federal exclusions man...

| Go to workspace |
| Go to Exclusions Federal hom... |

Get started searching exclusions
Use exclusions advanced search

Exclusions Resources
- Types of exclusions
- Legacy CT Codes
- Agency exclusions points of contact

Download Data Files
- Downloading exclusions files
- Understanding the exclusions extract
- Go to exclusions downloads

Connect to Data Services
- How to use data services
- Data services quick start guide
- Video: Using data services
- Go to public exclusions API

Help
- Frequ...
- Gloss...
- Videos

Entity Reporting

Entities that are awarded a federal contract, grant, or loan may be required to submit one or more post-award reports periodically, depending on award requirements. BioPreferred Reports and Service Contract Reports are submitted at SAM.gov.

Go to Entity Reporting

| 📁 | **BioPreferred Reporting** |
| 📁 | **Service Contract Reporting** |

To view and submit entity reports, you must have a data entry or administrator role. You can request roles from your **workspace.**

Getting started with BioPreferred Reporting   —

The BioPreferred program promotes sustainable acquisition of bio-based products to promote rural economic development, create new jobs, and provide new markets for farm commodities. Vendors who have been awarded services or construction contracts issued after May 18, 2012 are required to report on their purchase of BioPreferred products in accordance with FAR 52.223-2.

- (?) What is BioPreferred reporting?
- (?) Who needs to report BioPreferred data?
- (?) How do I create a BioPreferred report?

SAM.gov Integration Updates and Demo

System for Award Management | For People Who Make, Receive, and Manage Federal Awards

SAM.gov Integration: Entity landing pages

Entity Registrations Landing Page

SAM.gov Integration Updates and Demo

SAM.gov Integration: Entity landing pages

Getting Started with Entity Registration

Getting Started with Registration

This the official U.S. government website for entity registration. Entity registration is FREE.

Entity Registration Home

Before You Get Started

Before you start your registration, there are a few steps you must complete first. Review these steps to help ensure you set aside enough time to complete your registration.

1. Request a DUNS Number → 2. Prepare Your Data → 3. Get a Login.gov Account → 4. Submit and Finish

1. Request a DUNS Number

All entities wishing to do business with the federal government must have a unique entity identifier (UEI). Currently, the DUNS number, which is a unique nine-character identification number provided by Dun & Bradstreet (D&B) free of charge, is the official UEI. D&B assigns UEI (DUNS) for each physical location of a business. Requesting a UEI (DUNS) takes about 10 minutes. Receiving a UEI (DUNS) takes 1–2 business days (under normal circumstances) when using the D&B web form.

Register Your Entity

Register your entity to get started doing business with the federal government.

Get Started

Renew Entity

Check Registration Status

Already Registered?

Managing your entity registration
Managing users and roles (non-federal users)
Managing users and roles (federal users)

SAM.gov Integration Updates and Demo

SAM.gov Integration: Entity registration

Entity Registration - NO CHANGE to the registration screens or process

View assistance for Overview~Registration Overview

An official website of the United States government Here's how you know

SAM.GOV®

Requests | Notifications | Workspace | Sign Out

Home   Search   Databank   Data Services   Help

Register Entity

Overview

Purpose of Registration

Core Data

Representations and Certifications

Points of Contact

Submit Registration

Back to Workspace

Overview

Registration Overview

SAM Entity Management registrants are required to submit detailed information on their entity in the following categories, depending on the purpose of the registration:

Core Data
Mandatory for all registration types. Includes, but is not limited to, an entity's DUNS and/or DoDAAC, name, address, CAGE or NCAGE, code, TIN or EIN number, general information, financial information, and details about any proceedings in which the entity may currently be involved.

Assertions
Documents self-assertions from each entity. Includes, but is not limited to, data about the types of goods and services the entity provides, the entity size, optional Electronic Data Interchange (EDI), and disaster relief data.

You will see the new header and footer, including the feedback tool, but the registration form is the same.

SAM.gov Integration Updates and Demo

SAM.gov Integration: Entity registration

Entity Registration - NO CHANGE to the registration screens or process

If you leave your registration, anything on the current page will not be saved.

Like SAM today, we save when you move to the next or previous page.

SAM.gov Integration Updates and Demo

SAM.gov Integration: Roles and Permissions

Non-Federal Role Changes
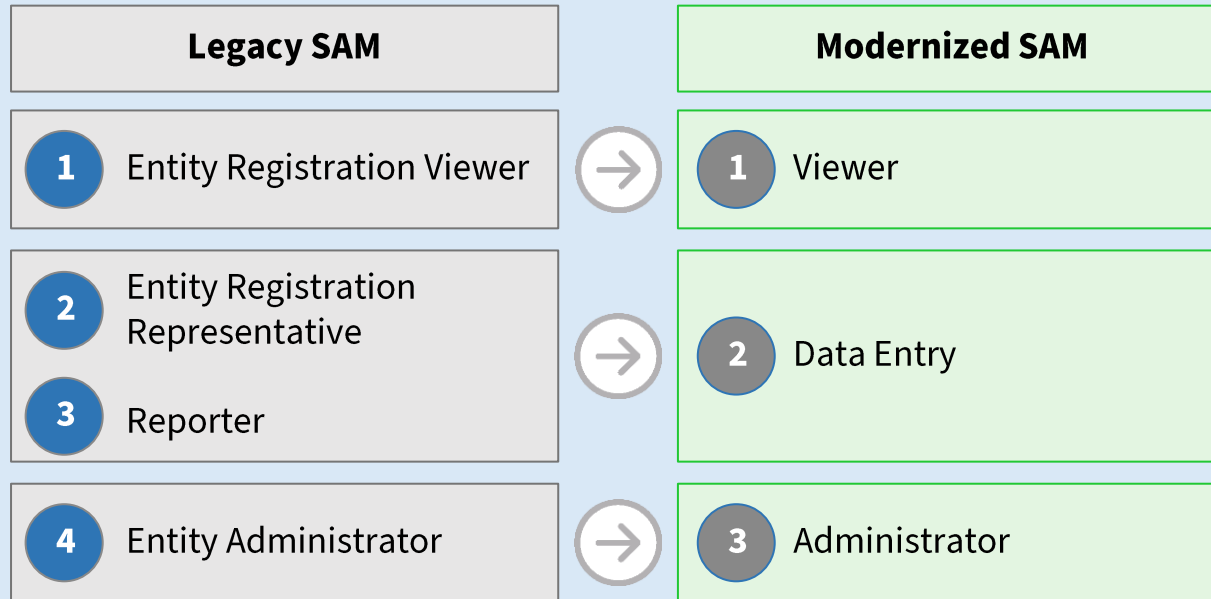
Legacy SAM		Modernized SAM
1 Entity Registration Viewer	→	**1** Viewer
2 Entity Registration Representative **3** Reporter	→	**2** Data Entry
4 Entity Administrator	→	**3** Administrator

SAM.gov Integration Updates and Demo

SAM.gov Integration: Roles and Permissions

Non-Federal Role Permissions

Viewer The Viewer role has the most restrictive access in SAM.gov.	• View but not update your entity's entity management registration • Search public data • Save search results.
Data Entry The Data Entry role inherits all *Viewer* permissions plus more.	• Update your entity's entire entity management registration • Create/update/delete Service Contract Reports (SCR) and BioPreferred Reports
Administrator The Administrator role has the most access in SAM.gov. It inherits all *Data Entry* and *Viewer* permissions plus more.	• Update and renew your entity's registration • Update a registration for your entity and any entities below it in your organization's hierarchy • Deactivate your entity's registration • Manage and assign which users have roles with your entity • Approve or reject entity hierarchy registration requests

SAM.gov Integration Updates and Demo

Role Management

How do I request a role?*

- **During registration, you are presented with a role request option**

- **From your Workspace page**

- **From the roles page of your profile**

***only certain roles can be requested**

Add A New Role

Select on the options below to request a new role. If you need a role that you do not see below, contact an administrator for your organization directly.

Data Entry

☑ I verify I have a business need for this role.

Request Role

SAM.gov Integration: Roles and Permissions

Non-Federal Role Requests and Invitations

Role management will be performed by entity administrators from the User Directory on the Workspace page.

Non-federal administrators will be able to:

- Use the User Directory to manage users across child entities

- Assign a role from the Workspace for users already registered

- Invite any user to a role in SAM.gov using their email address, even if they don't yet have a SAM.gov account

Users can also request a role, and an administrator can approve or reject the role request.

SAM.gov Integration Updates and Demo

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SAM.gov Integration: APIs and Data Extracts

SAM Extracts and SOAP Services are changing at the May 24, 2021 SAM integration.

If you use these services, prepare for change now! Go to open.gsa.gov to access these services and documentation.

- **SOAP Services will be replaced by REST APIs**. REST APIs are currently available for testing.

- **SAM Extracts will transition from SFTP to access through an API.** They are currently available via API for testing.

- After May 24, 2021, access to SAM.gov data services for entity and exclusion data will only be found at **open.gsa.gov**.

SAM.gov Integration Updates and Demo

SAM.gov Integration: Non-federal System Accounts

Non-federal users can use system account functionalities

System accounts allow those seeking to connect their systems directly to SAM.gov through extracts or web services.

They are used primarily for systems with the intent of regularly pulling large amounts of data

SAM.gov Integration Updates and Demo

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SAM.gov Integration: Identity Proofing

Identity Proofing (Soft Launch)

When you create, update, or renew a non-federal entity registration at SAM.gov on or after May 24, 2021, you will have the option to verify your identity at login.gov first. This will be optional for entity administrators at SAM.gov integration, but will become mandatory in FY22.

Identity proofing is the process of verifying that you are who you say you are. It involves supplying identifying information about yourself to login.gov. Login.gov will use the information to check your identity.

To verify your identity, you must provide the following:

- Your social security number
- A phone number that belongs to you
- A valid driver's license or state-issued photo ID

If you have all the information and documents required, you can expect your verification process to be complete within a few minutes.

SAM.gov Integration Updates and Demo

SAM.gov Integration: Prepare for the Change

- **Preview design changes now by creating an account at alpha.SAM.gov**

- **If your entity is up for renewal, we encourage you to act before the integration to renew your registration**

- **Early adoption for Identity Proofing**
  - Certain entity administrators will be granted **early access** to login.gov for identity verification
  - Early access will be prioritized based on needs (e.g., entities up for renewal soon)
  - Administrators will receive **targeted communications via email** about the opportunity to access identity verification

- If you are a federal user and have a system account in SAM, **it will NOT be migrated** to the new environment.
  - **Create your system account now in beta.SAM.gov before the transition**. To learn how to create a system account, view this System Account Video.

SAM.gov Integration Updates and Demo

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The IAE and Our Community

Engaging with our user community is the core to our approach to development. Even after transitions are complete, that doesn't mean we're done improving the tools and processes. Because we use the agile process for development, we are able to adapt to our users' needs.

- Send your feedback to IAE using the **feedback tool** located on most pages at SAM.gov

- Contact the **Federal Service Desk** at FSD.gov for free, live technical support.

- Follow the IAE community on **Interact.GSA.gov** to be notified about the latest updates.

SAM.gov Integration Updates and Demo

Questions?

Thank you!

SAM.gov Integration Updates and Demo

The Integrated Award Environment

GSA Federal Acquisition Service
1800 F Street, Washington, DC
Email: IAEOutreach@gsa.gov

Join us on Interact for the latest updates: https://interact.gsa.gov/group/integrated-award-environment-iae-industry-community