

## How to Update an Entity Registration in SAM.gov

SAM.gov is an official website of the United States government. There is **no** charge to register or maintain your entity registration in SAM.gov.

#### Start an Update to Your Entity Registration

You must renew your registration every 365 days for it to remain active. You can update your registration anytime there is a change to your organization's information. When you are ready to renew or update your registration, go to SAM.gov and follow these steps:

- 1. Select the "Sign In" link at the upper right corner of the page. Select "Accept" to accept the U.S. Government System terms. After selecting "Accept," the system will redirect you to login.gov.
- 2. Login.gov is a service that manages usernames and passwords for SAM.gov. If you already have a login.gov account, sign in with your credentials. Otherwise, select "Create An Account" and follow the prompts.
- 3. Once you are signed in, the system will redirect you to your SAM.gov Workspace.
- 4. In the "Entities" section in the Workspace, select the title, "Entities" to go to your Entity Workspace.
  - a. If you are unable to access an existing entity registration (active or inactive), you will need to request a SAM.gov Entity Administrator role from someone with your organization who has the administrator role. Third-party agents may only request a Data Entry role to assist with entity registrations, renewals, and updates.
  - b. If no one in your organization has the Entity Administrator role in SAM.gov, you can appoint a new one by submitting a letter to the Federal Service Desk (FSD) following the steps at this link. Note: only SAM.gov users with a position in the entity, e.g. employee, officer, or board member, can have an Entity Administrator role.
- 5. Locate the entity record you want to update, select the Actions menu (the three vertical dots) near the expiration date, and select "Update" from the menu.
- 6. On the "Enter Relationship to Entity" page, choose if you are an employee or officer of your organization, or not an employee or officer. Then, select the check box if you are authorized to conduct transactions on behalf of your organization and select "Next."
- 7. On the "Before you get started" page, select "Next."
- 8. The next page, "What is your goal?" will display three options for you to select the goal relevant to your entity. Choose your goal. Note: You only have to answer this question once and will not be asked on future updates.
  - a. From the three options, if you select to do business directly with the U.S. federal government, the screen will expand. Select an option from the expanded section. Then, select "Next."





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- b. If you select "With a business or other organization which receives funds directly from the U.S. federal government," the screen will expand. Select an option from the expanded section. Then, select "Next."
- c. If you select "**Other,**" the screen will expand. Select an option from the expanded section. Then, select "Next."
- 9. The "Who required your entity to be in SAM.gov" page will display. Select the source which required you to visit SAM.gov. Then, select "Next."
- 10. The "Your Entity Registration Information" page will display. You can either update your points of contact or update/renew your entire registration. Select update/renew your entire registration. Then, select "Next." Note: Updates to your entity registration information require IRS and CAGE validation, which can take up to ten business days.
- 11. The next page, "Choose an Option," displays your current purpose of registration. Here, you can change your purpose of registration. Changing your purpose of registration from Financial Assistance to All Awards requires you to provide additional information about your entity. <u>Read more about representations and certification and download our entity registration</u> <u>checklist (KB0042426)</u>. Choose "Select" under the purpose of registration for your entity.
- 12. If you already have a CAGE code, you'll be asked to confirm it. If you don't have a CAGE code associated with your entity record, the "Do you already have a CAGE code?" page will display. Choose
  - a. Yes, and I can provide, or
  - b. No, the entity does not have a CAGE code

Select "Next."

- 13. On the next page, review and confirm your purpose of registration, then select "Next."
- 14. On the "Review Current Registration Information" page, confirm whether or not your business name and address are correct by choosing the related bubble. Then, select "Next."
- 15. The "Continue Registration" page will display. If you don't want your entity included in public searches, uncheck the "include in public search" box to remove it from public search.

Select "Continue Registration."

- 16. The "Core Data" page will display. Select "Continue" to proceed through the registration, reviewing and updating information as needed, and select "Save and Continue" on each page.
- After you review the entire registration, select "Submit" on the "Entity Review" page.
  Note: Once you have submitted your update, you cannot make further changes until the submitted registration is processed.

### **Continuing a Registration Update**

You must review, and if needed, update each section of your entity registration to renew it.

1. Update the Core Data section.





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- 2. Update the Assertions section.
  - a. Assertions are not required if registering for federal assistance opportunities only.
- 3. Update the Representations and Certifications section.
- 4. Update the Points of Contact (POCs) section, including optional POCs.
  - a. You may remove optional POCs if they are no longer relevant.
- 5. If you qualify as a small business, update your information in the Small Business Administration's (SBA) Dynamic Small Business Search (DSBS) or apply for a small business certification via the SBA Supplemental page.
- 6. Select "Submit."
- 7. Review, then confirm your submission.

SAM.gov will send an email when your registration is submitted and again when the update is processed.

### When will my registration become active?

Allow at least **ten business days** after you submit your registration for it to become active in SAM.gov. If your entity fails TIN or CAGE code validation, SAM.gov will email instructions on updating your information and resubmitting your registration. You may need to work with the IRS for TIN, or the Department of Defense's Defense Logistics Agency for CAGE code, to update your information before resubmitting your registration.

#### How do I check the status of my entity registration?

You can check your entity registration status if you have a role with an entity and are signed in to your SAM.gov account. You can also check the status of an entity's registration as a federal user. If none of this is the case, you cannot check an entity's registration status.

- 1. Sign in to SAM.gov. You must be signed in to check your registration status.
- 2. From the home page, select the "Check Entity Status" button. The page is also linked in the footer of all pages on SAM.gov.
- 3. Enter a Unique Entity ID or CAGE code and select "Search." The entity's registration status will display below.

#### **Entity Roles**

Once you have an Entity Administrator, you should <u>assign the same role</u> to at least one other person in your organization. Otherwise, you will have to submit another letter to replace your Entity Administrator if they leave your organization (which can delay renewing your registration).

Note that the Entity Administrator role can only be held by a SAM.gov user who has a position in the entity, for example, an employee, officer, or board member. Third-party agents cannot hold an Entity Administrator role, but can be assigned a Data Entry role, which allows them to help with entity registrations, renewals, and updates, but not role management.





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See the <u>Role Management Guide</u> and more information on specific <u>roles and permissions</u> to learn more about entity roles.

