



Quick Start Guide for Updating/Renewing Registrations that Were Previously in CCR and Are Now in SAM

How to update or renew your entity record in SAM:

Before you start, you need to know the following:

REGISTERING IN SAM IS FREE

What is an Entity?

In SAM, your company/business/organization is now referred to as an "Entity".

- If you were registered in CCR and ORCA, your organization's information is already in SAM. You just need to set up a SAM account and migrate your CCR roles. See the "Migrating Roles" Quick Start Guide.

Viewing Your Entity Record

How you view your entity record depends on several factors

- If you chose to make your record public, you can view your entity record by going to www.sam.gov and searching for your DUNS number or Entity Name
- If your record is available in the public search, but expired, you can view it by searching for your entity by DUNS number or Entity Name, clicking on the "Inactive" box, and clicking the "Apply Filters" button
- If you opted out of the public search, log into SAM, migrate your roles, and the click on "Register/Update Entity" and "Complete Registrations" to view your record

Requirements for Submitting Your Registration

Federal regulation requires a complete review of your record

- To submit your update, you must review the entire record in one sitting
- Review each page, validating the accuracy of the content, and clicking on "Save and Confirm" or "Save and Continue" on every screen -- and "Submit" at the end.
- If your registration requires Reps & Certs (formerly ORCA), make sure you select the box certifying to the accuracy of the data on the "Review Reps & Certs" page

Steps for Updating/Renewing Your Entity Record in SAM

- Go to www.sam.gov and login with your SAM username and password
- Click "Register/Update Entity" and then "Complete Registrations" (if you started your update earlier, click on "Incomplete Registrations")

- In the Entity List panel, click on the Entity you want to update/renew
- Click the Update Entity button in the "Registration Details" Panel
- Complete Purpose of Registration (You only have to do this once)
- Validate/Update "Core Data"
 - ✓ Your DUNS information (if you need to update this information, go to <http://fedgov.dnb.com/webform>). If you have updated your information with D&B, click the "Refresh D&B Data" button on SAM's "Verify DUNS Information" page for the updates to appear in SAM.
 - ✓ Business Information (TIN, etc.)
 - ✓ IRS Consent Information (optional for foreign registrants)
 - ✓ CAGE/NCAGE code
 - ✓ General Information (business types, organization structure, etc)
 - ✓ Financial Information (Electronic Funds Transfer (EFT) Information)
 - ✓ Executive Compensation
 - ✓ Proceedings Details
 - ✓ Information Opt Out (Select whether to authorize your entity to be displayed in SAM's public search)
- Validate/Update "Assertions" (not required to be eligible for Grants only)
 - ✓ Goods and Services (NAICS, PSC, etc.) – be sure to select a primary NAICS
 - ✓ Size Metrics
 - ✓ EDI Information (optional)
 - ✓ Disaster Relief Information (optional)
- Validate/Update "Representations and Certifications" (not required to be eligible for Grants only)
 - ✓ FAR Responses
 - ✓ Architect-Engineer Responses
 - ✓ DFARS Responses
- Validate/Update "Points of Contact", including optional POCs. If you no longer wish to have the optional POCs, please delete all data in these fields.
- If you qualify as a small business, validate/update your information in SBA's Dynamic Small Business Search (DSBS) or apply for a small business certification on the "SBA Supplemental" page.
- Click Submit!** Note: If your update/renewal requires IRS or CAGE re-validation, it will take 3-5 business days for it to become active and replace your previous registration.

How do I get more information? Take a look at the SAM User Guide.



Go to Our Website: www.sam.gov



Contact the SAM Help Desk: www.fsd.gov

