

# SAM: Core Data Guide

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Every step and every question explained



**Your Entity's Business Information:**

1 Entity Start Date ( M M / D D / Y Y Y Y ): \*

2 Fiscal Year End Close Date (MM/DD): \*

3 Entity Division Name:

4 Entity Division Number:

5 Entity URL:

6 Congressional District:

VA 08

7 Create MPIN: \*

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.

- 1 **Entity Start Date:** This is the date the you started your company (typically the date you registered your company with the IRS)
- 2 **Fiscal Year End Close Date:** This is the date you use for tax purposes. If you have an accountant ask them, If you don't have an accountant we recommend using Dec. 31st. You can change this date later.
- 3 **Entity Division Name:** If you are a new business leave this blank
- 4 **Entity Division Number:** If you are a new business leave this blank
- 5 **Entity URL:** If you have a website you can add it
- 6 **Congressional District:** SAM populates this for you
- 7 **Create MPIN:** Create a password and write it down, you will use it on the next screen and each year when you renew your SAM registration

1

▼ Mailing Address - ARLINGTON

COPY PHYSICAL ADDRESS

Address Type: Mailing

Address Line 1\*: 2011 CRYSTAL DR

Address Line 2: STE 400420

City\*: ARLINGTON

State/Province\*: VIRGINIA

ZIP/Postal Code\*: 22202 3709

Country\*: UNITED STATES

2

**Taxpayer Identification Number (TIN):**

Select your TIN Type. Most entities who pay U.S. taxes select Employer Identification Number (EIN). If you don't have one, you can [request an EIN online from the IRS](#) for free. If you are a Sole Proprietor or a single-member Limited Liability Company (LLC), you may select Social Security Number (SSN). Choose carefully. You cannot change your TIN Type once you navigate beyond this page.

TIN Type\*: EIN

**Note:** If you select SSN as your TIN Type on this page, you must select either Sole Proprietorship or Limited Liability Company on the General Information page later during this registration.

EIN: \*\*\*\*\*2211 **UPDATE**

Cancel **Save and Continue**

1

**Mailing Address:** Where you want official mail sent, typically this is the same as the physical address

2

**Taxpayer Identification Number:** You should have gotten this when you registered with the IRS

# Core Data

## IRS Consent

### Provide Taxpayer Information:

1

Taxpayer Name\*:

Use only letters, numbers, spaces, hyphens (-), and ampersands (&). Omit any other special characters that are part of your Taxpayer Name.

Taxpayer Identification Number (TIN):

\*\*\*\*\*2211

### Taxpayer Address:

COPY MAILING ADDRESS

COPY PHYSICAL ADDRESS

Address Line 1\*:

Address Line 2:

City\*:

State/Province\*:

Please select a value

ZIP/Postal Code:

Country\*:

Please select a value

Type of Tax:

Applicable Federal Tax

2

Tax Year (YYYY)\*:

(Insert Most Recent Tax Year)

2021

3

Name of Individual Executing Consent\*:

Title of the Individual Executing Consent\*:

4

Signature\*:

Enter your MPIN here

Date:

Date will populate when you select Save and Continue.

Cancel

Previous

Save and Continue

1

**Taxpayer Name:** The name of the company as written on your IRS registration

2

**Tax Year:** The last year you paid corporate taxes. If you are a new business put this year

3

**Name & Title of Individual Executing Consent:** Your name and title

4

**Signature:** The MPIN you created on the last screen



## Core Data

### CAGE Code

Does your entity already have a CAGE Code? \*

☐ Yes ☐ No

1

CAGE Code:

Cancel

Previous

Save and Continue

1 **CAGE Code:** If this is your first time registering select No

## Core Data

### Ownership Details

Does another entity own or control the entity you are registering?\*

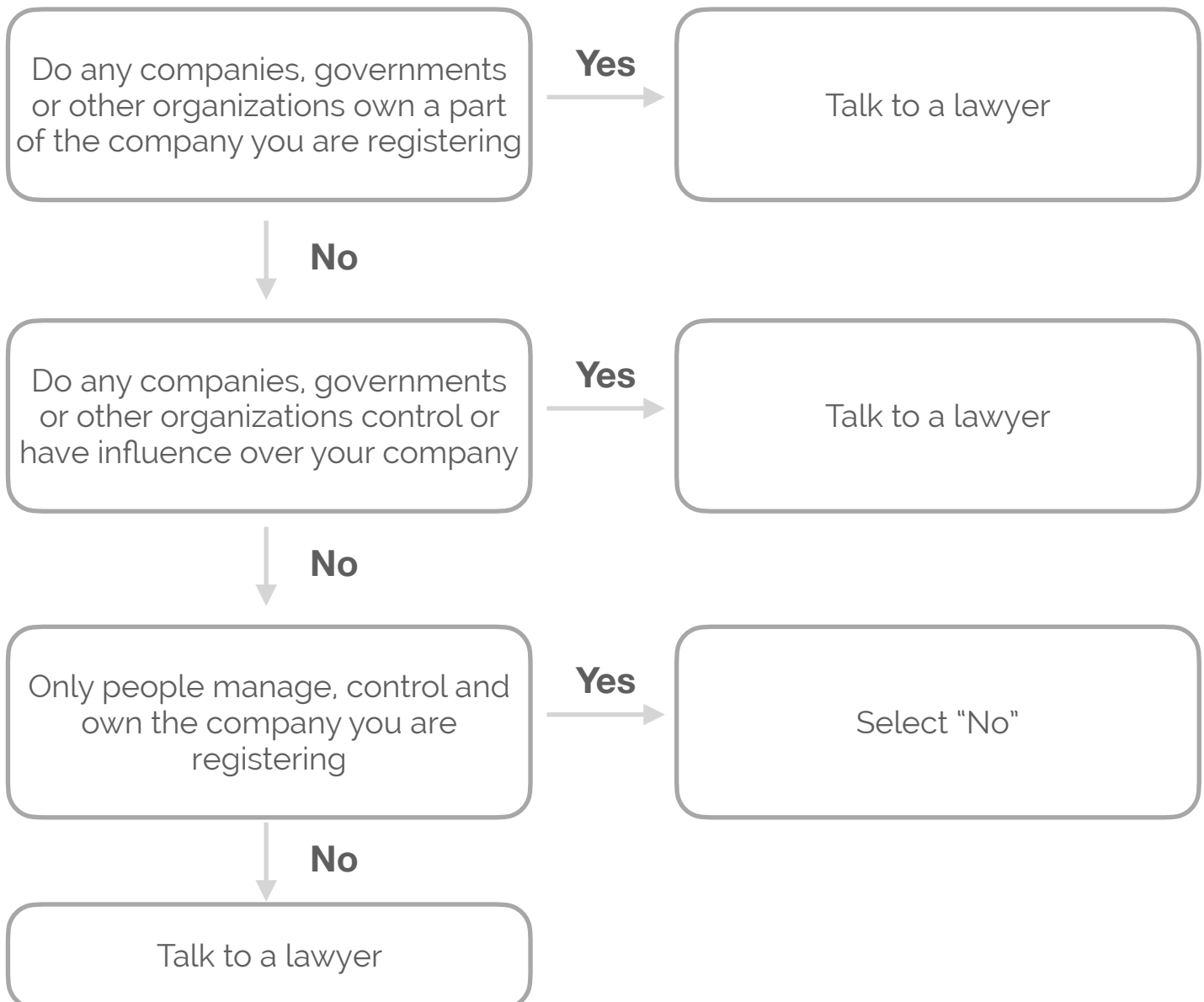
☐ Yes

☐ No

View the [definition of Immediate Owner](#) on Acquisition.gov.

**Explanation of this question:** The government doesn't want large businesses to abuse the small business programs by incorporate a bunch of small businesses that they own/control

**To answer this question:**



## Core Data

### Predecessor Details

Are you a successor to a predecessor that held a Federal contract or grant within the last three years?\*

☐ Yes

☐ No

**Explanation of this question:** The government doesn't want people to abuse the small business programs or to hide a previous company's bad behavior by just incorporating a new company and moving the old companies assets to the new one

**To answer this question:**



1 Country of Incorporation:

Please select a value

2 Entity Security Level:

Please select a value

3 Highest Employee Security Level:

Please select a value

### Entity Type:

You categorized your entity as: **Business or Organization**. Further describe your entity by selecting the relevant business types.

4 Institution Type:

Does your entity qualify as one of the following institution types? If none of these apply, select Not Applicable.

Not Applicable

1 **Country of Incorporation:** Typically this is the US

2 **Entity Security Level:** As a new business the answer is probably None

3 **Employee Security Level:** If an owner/employee has a clearance list the highest one

4 **Institution Type:** Review the list, most businesses put "Not Applicable"



1

**Disadvantaged Business Enterprise:**

Is your entity certified by a state certifying agency as a Department of Transportation Disadvantaged Bus

No 

2

**Native American Entity Type:**

If your organization is a Federally Recognized Native American Entity, choose all that apply:

- ☐ Alaskan Native Corporation Owned Firm
- ☐ American Indian Owned
- ☐ Indian Tribe (Federally Recognized)
- ☐ Native Hawaiian Organization Owned Firm
- ☐ Tribally Owned Firm

1

**Disadvantaged business:** You may qualify for this designation but if you haven't gotten the designation from a State certifier then put No

2

**Native American Entity Type:** You may qualify for this designation but if you haven't gotten the designation from the Feds leave this blank and fill it in once you've gotten the designation

1

### **Organization Factors:**

Do one or more of these organization factors apply to your entity? If none of these apply, select Not Applicable. NOTE: If you are Manufacturer of Goods, you may also make one other selection. First select Manufacturer of Goods, then another drop down box for your next selection.

Not Applicable ▼

1

### **Entity Structure:**

What is the form of your entity as defined by the IRS? \*

Please select a value ▼

1

### **Profit Structure:**

What is your entity's profit structure? \*

Please select a value ▼

2

### **Socio-Economic Categories:**

Select any socio-economic categories which reflect the current status of your entity. If applicable, your small business status will be derived from the receipts, number of employees, assets, or megawatt hours, and NAICS codes entered in the Assertions portion of registration and displayed in the Representations and Certifications portion of this registration.

- ☐ Veteran Owned Business
- ☐ Woman Owned Business
- ☐ Joint Venture Women-Owned Small Business
- ☐ Joint Venture Economically Disadvantaged Women-Owned Small Business
- ☐ Community Development Corporation Owned Firm
- ☐ Minority Owned Business

1

### **Organizational factors:**

#### **Entity Structure:**

**Profit Structure:** Review your articles of incorporation, state and IRS registrations and fill in

2

**Socio-Economic Categories:** You may qualify for one or more designations but if you haven't gotten the designation from the Fed's leave this blank and fill it in once you've gotten the designation

# Core Data

## Financial Information

1 Do you accept credit cards as a method of payment? ☐ Yes ☐ No

### 2 New Account

#### Electronic Funds Transfer (EFT):

Account Type:

Financial Institute:

ABA Routing Number:

Account Number:

Lockbox Number:

#### Automated Clearing House (ACH):

Please enter at least one method of contact for your A.C.H below.

A.C.H U.S. Phone:  ( x x x ) x x x - x x x x

A.C.H Non-U.S. Phone:  x x x x - x x x x x x x x x x x x

A.C.H Fax:  ( x x x ) x x x - x x x x

A.C.H Email:

#### Remittance Address:

Name:

Address Line 1:

Address Line 2:

1 **Do you accept Credit cards:** The government can buy low cost product and services with government payments cards. If you want to accept those purchases click Yes

2 **New Account:** Enter the bank payment information requested (you may need to call your bank/have a check ready to copy information from)



## Core Data

### Executive Compensation Questions

#### Executive Compensation:

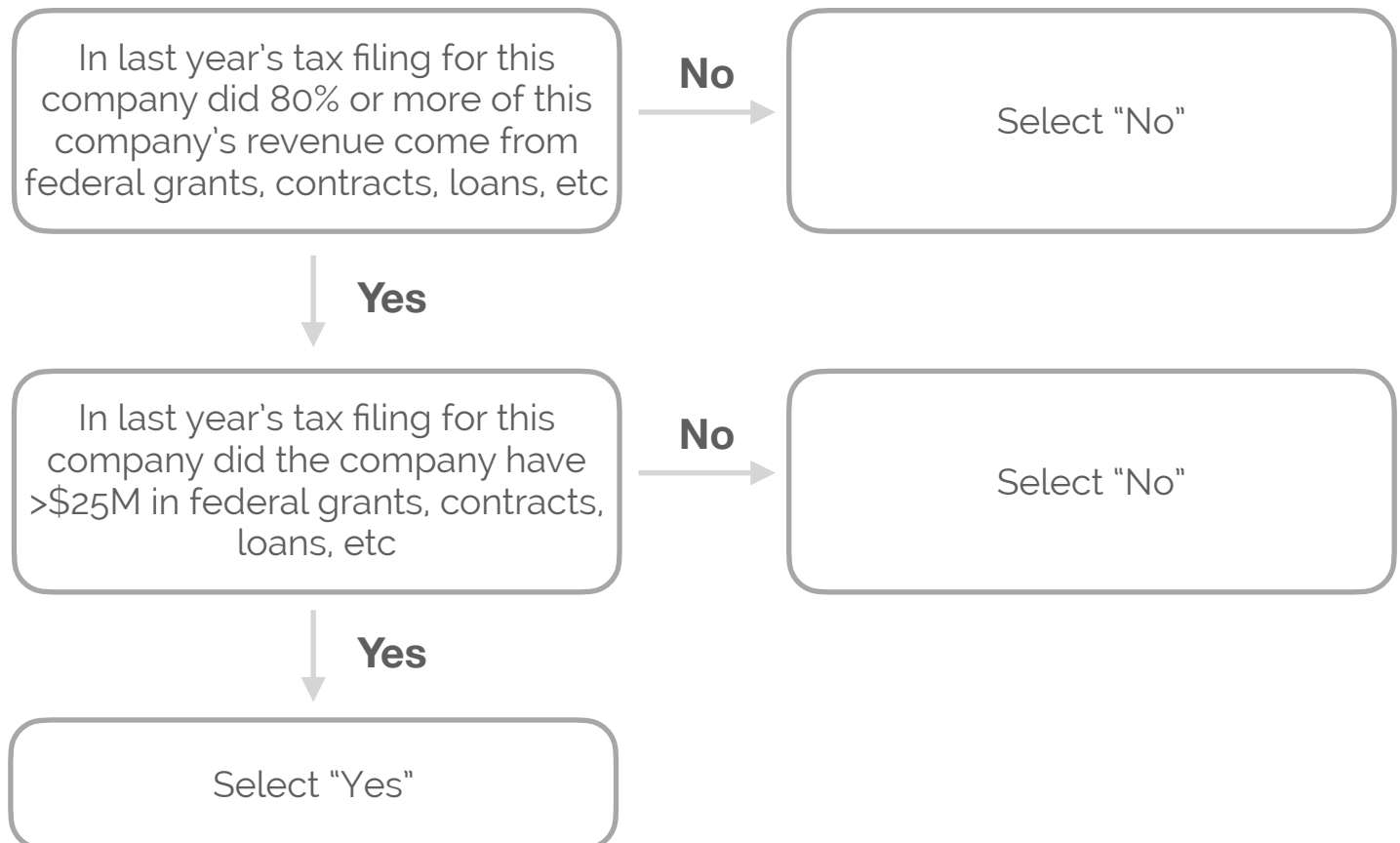
In your business or organization's preceding completed fiscal year, did your business or organization (the legal entity to which this specific SAM record, represented by a Unique Entity ID, belongs) receive both of the following:

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? \*

Please select a value ▾

**Explanation of this question:** The government wants to know if you are a "government contractor" e.g. a company that makes most of its money from federal sales, and makes a lot of money in federal sales

#### To answer this question:



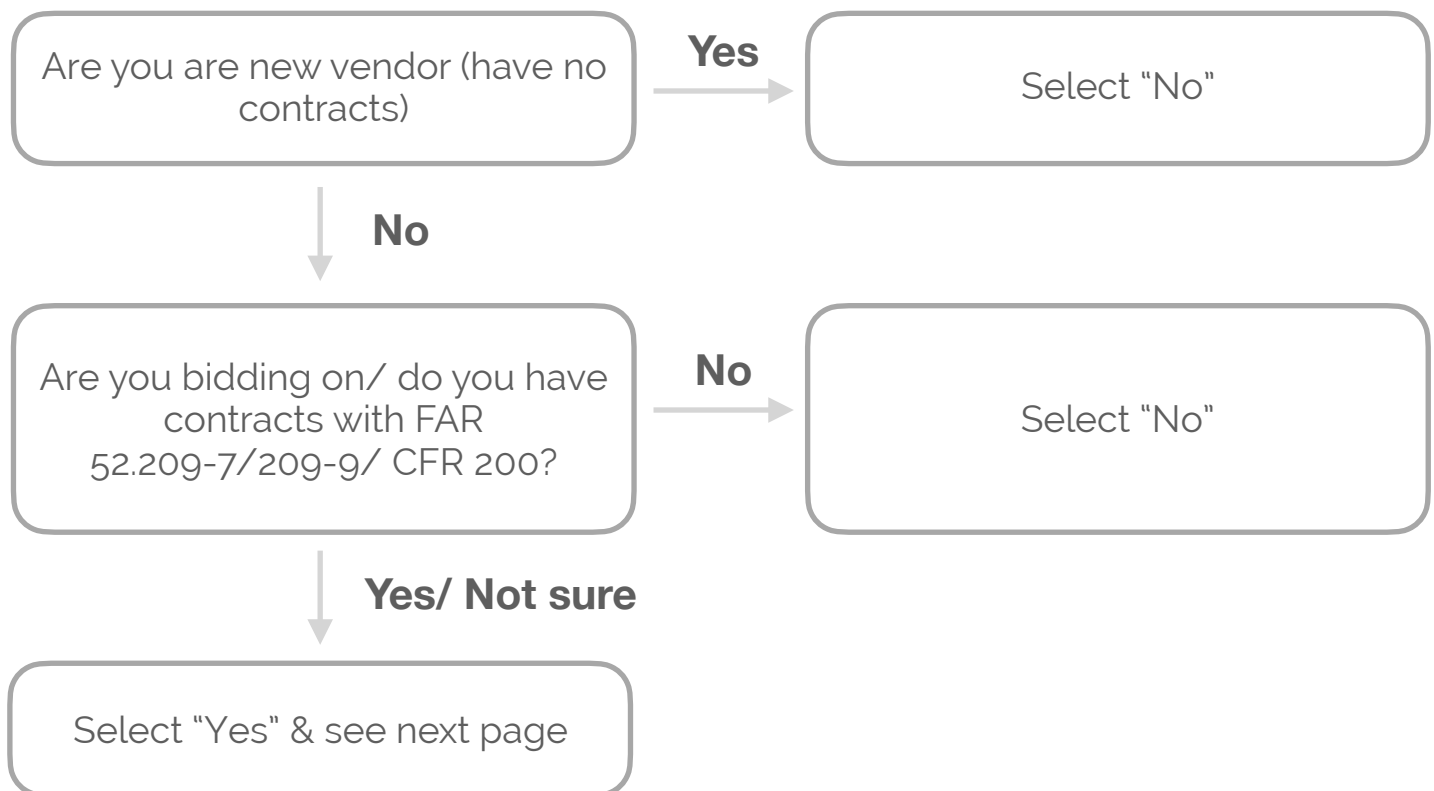
### Proceedings:

Is your business or organization, as represented by the Unique Entity ID on this entity registration, responding to a Federal procurement opportunity that contains the provision at FAR 52.209-7, subject to the clause in FAR 52.209-9 in a current Federal contract, or applying for a Federal grant opportunity which contains the award term and condition described in 2 C.F.R. 200 Appendix XII? \*

Please select a value ▾

**Explanation of this question:** Certain government contracts require that the company report on their activities and performance. If you are a new vendor this clause does not apply

### To answer this question:

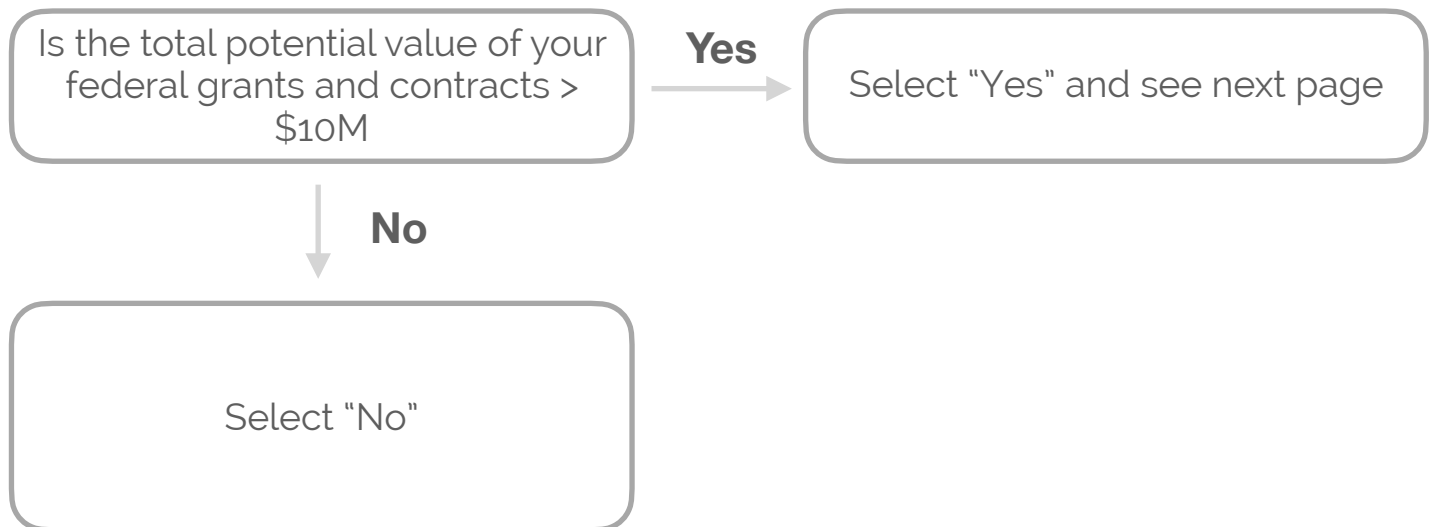


Does your business or organization, as represented by the Unique Entity ID on this specific SAM record, have current active Federal contracts and/or grants with total value (including any exercised/unexercised options) greater than \$10,000,000?

Not Applicable

**Explanation of this question:** Certain government contracts require that the company report on their activities and performance. If you are a new vendor this clause does not apply

**To answer this question:**



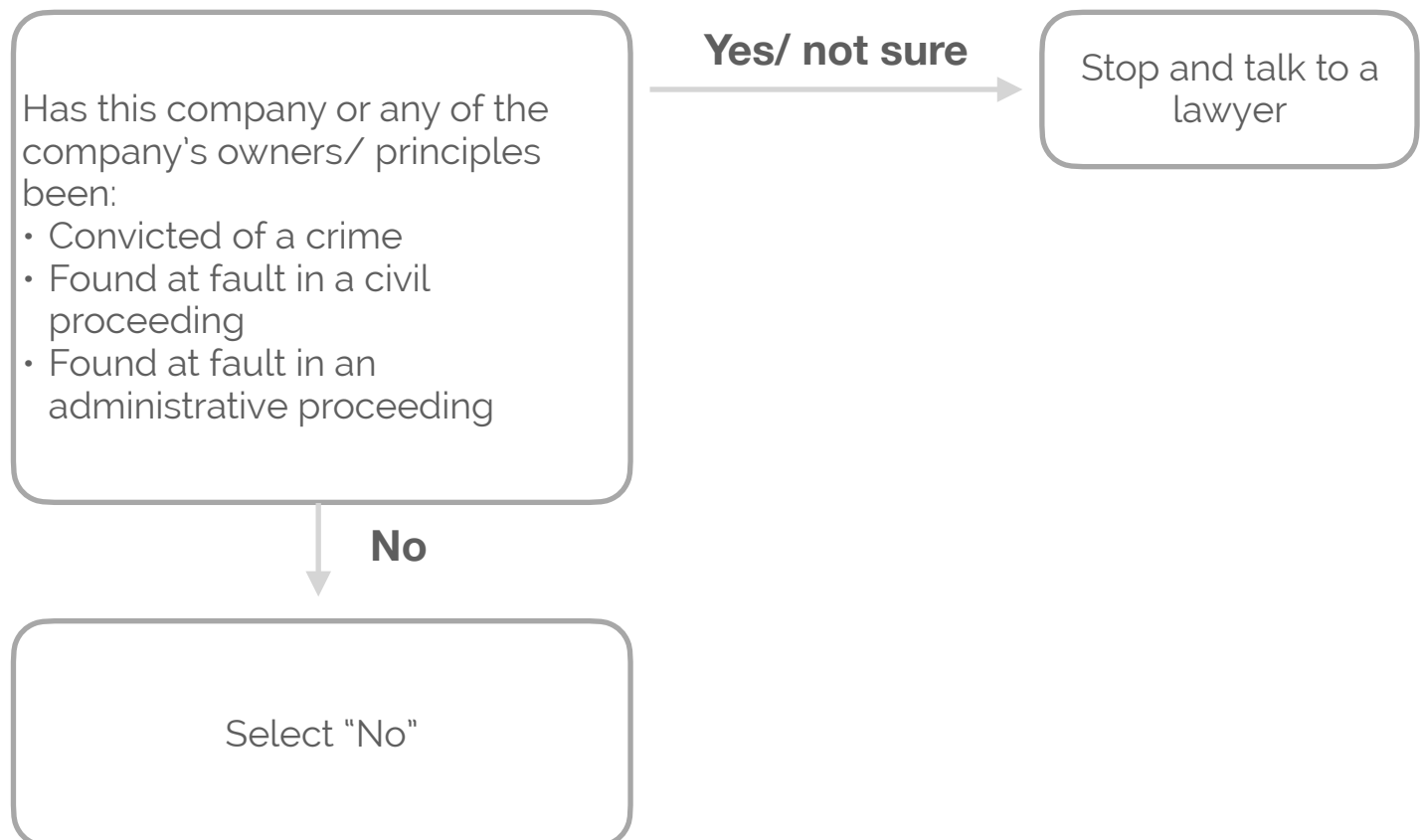
Within the last five years, had the business or organization (represented by the Unique Entity ID on this specific SAM record) and/or any of its principals, in connection with the award to or performance by the business or organization of a Federal contract or grant, been the subject of a Federal or State

1. Criminal proceeding resulting in a conviction or other acknowledgment of fault;
2. Civil proceeding resulting in a finding of fault with a monetary fine, penalty, reimbursement, restitution, and/or damages greater than \$5,000, or other acknowledgment of fault; and/or
3. Administrative proceeding resulting in a finding of fault with either a monetary fine or penalty greater than \$5,000 or reimbursement, restitution, or damages greater than \$100,000, or other acknowledgment of fault?

Not Applicable

**Explanation of this question:** Certain government contracts require that the company report on their activities and performance. If you are a new vendor this clause does not apply

**To answer this question:**



## Core Data

### Review Core Data

Review the data entered and if it is correct click "Save and Continue"

#### Page Description

You have completed the Core Data section of your entity's registration in SAM. Please validate the information presented on this page is correct before continuing. Select Edit to make changes to the appropriate sections. If you are satisfied with the information entered, select Save and Continue.

Unique Entity ID:	H487QGNGTTJ5
Legal Business Name:	THREAT PROTOTYPING ALLIANCE
Doing Business As:	(none)

#### SAM Search Authorization

I authorize my entity's non-sensitive information to be displayed in SAM public search results:

Yes

Cancel

Previous

Save and Continue



# About the Authors

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## Geoff Orazem

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Geoff has been helping start-ups access and grow in the federal market for six years, has been giving workshops, classes, writing about, applying for, and winning SBIRs and advising federal agencies about SBIR for the past three years.

Geoff was a Marine Infantry officer and is a graduate of Harvard Law School. Before getting into Federal he was an Engagement Manager for McKinsey & Co.

# About this Guide

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Registering in [SAM.gov](https://sam.gov) is your ticket to sell to the federal government.

In this guide we go through every step in the registration process and translate the regulatory language in SAM into “Plain English”