



# Rural Education Achievement Program

## SAM.gov - Registration and Validation

Salomeh Ghorbani

Director, Outreach and Stakeholder Engagement  
Integrated Award Environment

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# Agenda

- Entity Registration - Getting Started
- Registration and Validation Tips
- Getting Help with SAM.gov



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

# Entity Registration - Getting Started



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# Who Should Register an Entity?

Entity registration in SAM.gov is the process to make your organization **eligible** to bid on U.S. federal contracts and apply for federal grants.

If you want to bid on or apply for federal awards **directly** with the U.S. government, you need to complete and maintain an active registration.



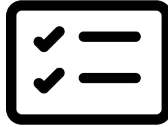
Entity registration requires a lot of information about your organization.

The person registering should be an employee, officer, or board member of your organization.

They should have:

- Knowledge of your **organizational structure**
- Authorization to access **financial, legal, and tax information**
- Ability to answer questions about your organization's **products or services**, or be able to get this information from others in your organization

# What Do I Need to Register an Entity?

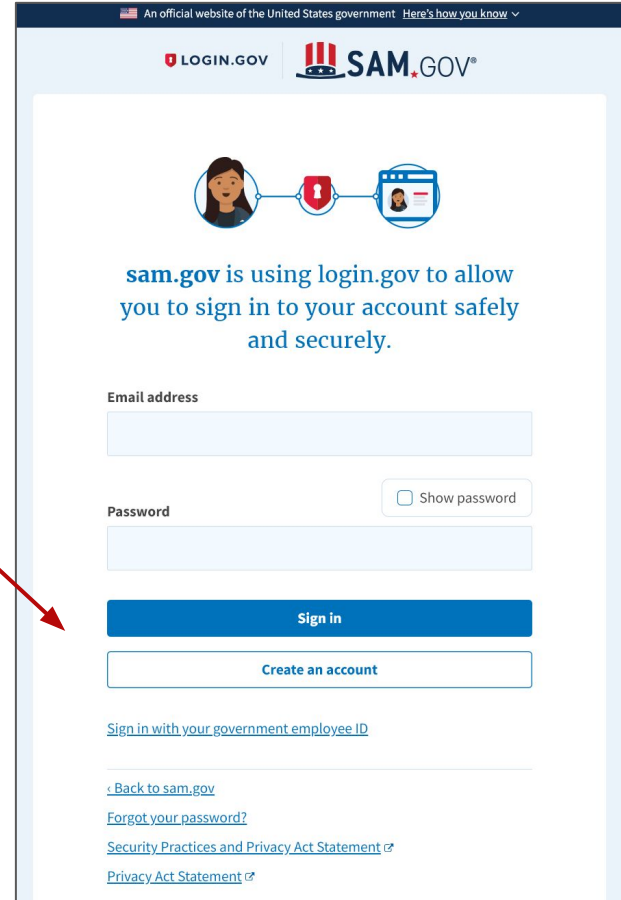
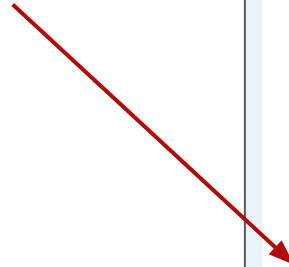
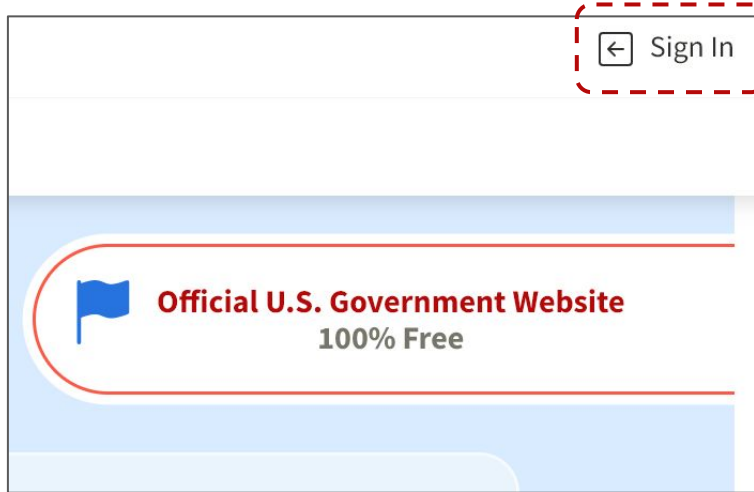


- Decide who will complete the registration. They will be the first entity administrator and are the only administrator until they assign the administrator role to others.
- Identify at **least one other person** to give administrator access to the registration. You can have as many people as you want as administrators. Get SAM.gov user accounts for each individual who needs access to the registration. Each person must have their own user account. Accounts cannot be shared.
- Review the [Entity Registration Checklist](#) and other guides. It shows the questions you must answer in your registration and the documents that may be required to validate your entity. Get the checklist at FSD.gov or go to the URL below.

## Registration Checklist

[https://www.fsd.gov/gsafsd\\_sp?id=kb\\_article\\_view&sysparm\\_article=KB0039524](https://www.fsd.gov/gsafsd_sp?id=kb_article_view&sysparm_article=KB0039524)

# Sign In



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# Workspace: Create New Entity

## Entity Information

Entities

See All

5

Active Registration

2

ID Assigned

5

Inactive Registration

Next Update Due: 12/04/2024

Due in Next 30 days: 0 Entity Registrations

Register Your Entity or Get a Unique Entity ID

What do I need for registration?

Get Started

## Welcome

You are about to create a new entity record.

We will ask a few short questions to help us recommend the best option for you.

Create New Entity

**Are you trying to update an existing entity record?**

Please go to your Workspace and select the "Renew/Update" button for that entity.

Go to Workspace

**Is your entity based outside of the United States?**

You must get an NCAGE Code before starting a registration. Go to the [NCAGE Request Tool](#) to submit a request.

**What do I need for registration?**

Download Guide



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# Workspace: Renew or Update Entity

The screenshot displays the SAM.GOV workspace interface. On the left, a navigation pane includes a 'Renew/Update Your Entities' section with a 'Renew/Update' button. The main workspace area shows a list of entities under 'Non-Federal Entities'. A red arrow points from the 'Renew/Update' button to the 'Entity Workspace' search bar. Another red arrow points from the 'Actions' menu (circled in blue) to the 'Update' option. A third red arrow points from the 'Update' option to a magnified view of the entity details. The magnified view shows the following information:

- Entity Name: [Redacted]
- Status: Inactive Registration
- Unique Entity ID: [Redacted]
- Doing Business As: (blank)
- Purpose of Registration: All Awards
- Expiration Date: Mar 2, 2006
- CAGE/NCAGE: [Redacted]
- Physical Address: [Redacted]





# Entity Questionnaire

## What is your goal?

I want to do business... (Select the option most relevant to you)

- Directly with the U.S. federal government.
- With a business or other organization which receives funds directly from the U.S. federal government.
- Other.

 Select the answer that best fits your intentions today:

- Provide goods or services as a federal subcontractor. [?](#)
- Receive a subaward under a federal grant/financial assistance program. [?](#)
- Apply as a direct vendor for federal funds distributed by a government entity other than the federal government. [?](#)  
(e.g. state, local, tribal, territorial)
- Apply as a grantee for federal funds distributed by a government entity other than the federal government. [?](#)  
(e.g. state, local, tribal, territorial)
- Just browsing. I don't have anything specific in mind today, but might be interested in future work with organizations who receive funds directly from the U.S. federal government.

- Participate in, or apply for, other programs. Please describe.

Please specify

e.g. Program Name

123 characters allowed

## Who required your entity to be in SAM.GOV?

Only select the primary source.

- Federal government

- U.S. state or territory government or office

- Local government office, i.e., of a county or a city
- Tribal government or office
- A company or business
- Hospital system or healthcare organization (for profit or non-profit)
- Non-profit organization
- University or research facility (for profit or non-profit)
- Industry group, professional association, trade publication, etc.
- Procurement Technical Assistance Center (PTAC) or PTAC office
- I decided on my own
- None of the above  
Please specify

e.g. Program Name

# Purpose of Registration Table

## Choose an Option

Review the chart to decide which option is

## For Updating Entities

	Financial Assistance	All Awards
<b>What you get:</b>		
Unique Entity ID <input type="checkbox"/>	✓	✓
Entity Available in Search <input type="checkbox"/>	✓	✓
CAGE Code <input type="checkbox"/>	✓ <small>(For some entities)</small>	✓
<b>When you need it:</b>		
To receive an award from someone else receiving federal funds <input type="checkbox"/>	✓	✓
To apply directly for federal grants or loans <input type="checkbox"/>	✓	✓
To bid on federal contracts (prime) <input type="checkbox"/>	—	✓
<b>What you must complete:</b>		
Entity Validation <input type="checkbox"/>	✓	✓
IRS Taxpayer Validation <input type="checkbox"/>	✓	✓
CAGE/NCAGE Validation <input type="checkbox"/>	✓ <small>(For some entities)</small>	✓
<b>Level of Effort</b> <input type="checkbox"/>	<b>Medium to High</b>	<b>Highest</b>
<b>Expiration</b> <input type="checkbox"/>	1 Year	1 Year
	<input type="button" value="Select"/>	<input type="button" value="Select"/>

Keep your current option

## For New Entities

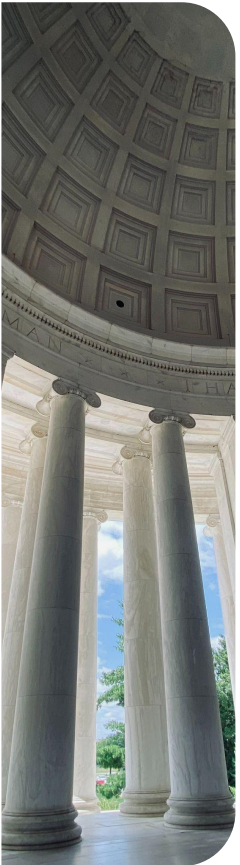
## Choose an Option

It looks like you intend to do business directly with the U.S. federal government on a procurement opportunity as a prime contractor. We recommend you choose **All Awards**.

This option also allows you to pursue financial assistance directly from the U.S. federal government.

	Unique Entity ID Only	Financial Assistance	All Awards
<b>Recommended</b>			
<b>What you get:</b>			
Unique Entity ID <input type="checkbox"/>	✓	✓	✓
Entity Available in Search <input type="checkbox"/>	✓	✓	✓
CAGE Code <input type="checkbox"/>	—	✓ <small>(For some entities)</small>	✓
<b>When you need it:</b>			
To receive an award from someone else receiving federal funds <input type="checkbox"/>	✓	✓	✓
To apply directly for federal grants or loans <input type="checkbox"/>	—	✓	✓
To bid on federal contracts (prime) <input type="checkbox"/>	—	—	✓
<b>What you must complete:</b>			
Entity Validation <input type="checkbox"/>	✓	✓	✓
IRS Taxpayer Validation <input type="checkbox"/>	—	✓	✓
CAGE/NCAGE Validation <input type="checkbox"/>	—	✓ <small>(For some entities)</small>	✓
<b>Level of Effort</b> <input type="checkbox"/>	<b>Lowest</b>	<b>Medium to High</b>	<b>Highest</b>
<b>Expiration</b> <input type="checkbox"/>	—	1 Year	1 Year
	<input type="button" value="Select"/>	<input type="button" value="Select"/>	<input type="button" value="Select"/>





# Registration

## Register Entity

- Core Data
- Continue Update / Renewal**
- Business Information
- IRS Consent
- Ownership Details
- Predecessor Details
- General Information
- Financial Information
- Executive Compensation Questions
- Proceedings Questions
- Review Core Data

Assertions

Representations and Certifications

Points of Contact

Submit Registration





[Back to Workspace](#)

[Cancel](#)

## Core Data

Continue Update / Renewal Unique Entity ID: [REDACTED]

You have the following steps left to complete:

-  Core Data
-  Assertions
-  Representations and Certifications
-  Points of Contact

[Continue](#)

*TIP: Go to [FSD.gov](https://www.fsd.gov) and select the **Get Started with Your Registration** button for a checklist and more.*

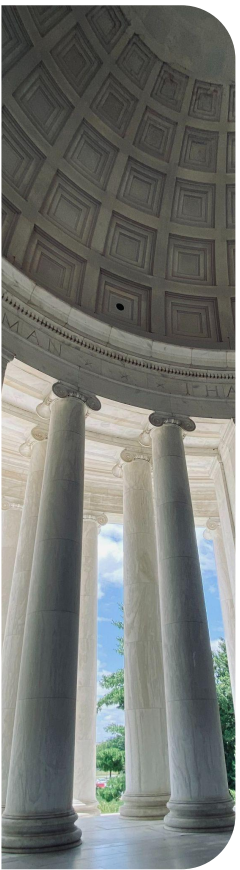


# Registration Tips



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# Registration Tips

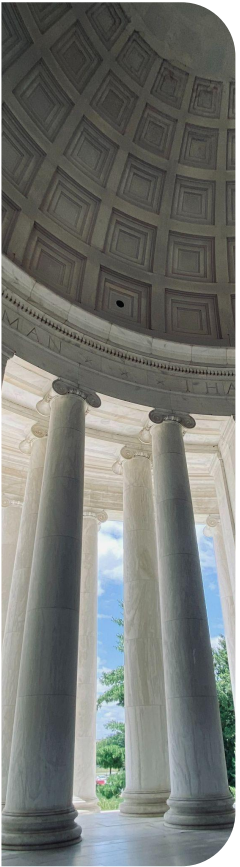
## Start updates and renewals early

Entity Administrators receive emails about registration expiration and submission. You get emails when a registration:

- Will expire in **60 days, 30 days, and 15 days.**
- Has expired on the date of expiration.
- Has been submitted successfully for review.
- Is active.

If you need to change your entity name or address on your registration, **start early.**

While validation takes on average **3-5 business days**, it can take longer if there are complications. The IRS verifies your taxpayer information, which can take **1-2 business days.** If you are getting a CAGE code, it can take **10-15 business days** for DLA to process a request.



# Registration Tips

Use the **Check Entity Status** tool on the SAM.gov homepage.

 [Check Entity Status](#)

### Check Entity Status

This tool allows you to check the status of your entity.

Search by Unique Entity ID/CAGE  Search entities pending Unique Entity ID assignment

Unique Entity ID

CAGE Code

#### Entity Information

Active Registration

Unique Entity ID

Your registration was activated on 2023-12-06. It expires on 2024-11-20, which is one year after you submitted it for processing. To update or renew your registration, begin from your Entities Workspace.

Validate Entity Completed

Get Unique Entity ID Completed

Core Data Completed

Assertions Completed

Reps & Certs Completed

POCs Completed

Submit Completed

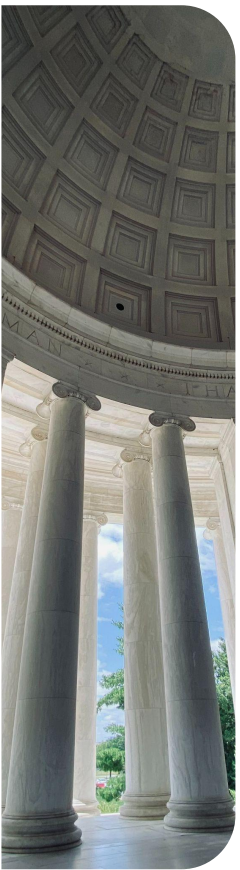
Processing Completed

Active Completed

#### More About the Entity Status Tracker

- + Getting Started with Registration
- + Entity Status Guide
- + Legend
- + What if my entity fails TIN validation?
- + What if my entity fails CAGE validation?
- + More Help

*You must sign in to SAM.gov and have a role with the entity to use the tool.*



# Registration Tips

## Assign more than one Entity Administrator

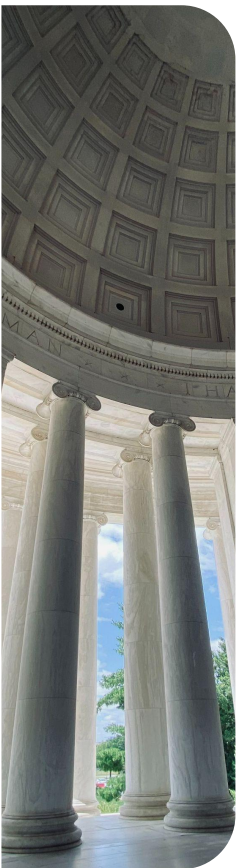
SAM.gov grants the Entity Administrator role to the first user to register a non-federal entity in SAM.gov. With the Entity Administrator role, you have all privileges to manage your entity registration.

You can **invite or assign other people** in your organization to be an Entity Administrator. There are **no limits** to how many people can be administrators.

The points of contact you list on your registration **are not** automatically granted the Entity Administrator role. You must assign the role to anyone in your organization who needs it.

**How can I become the new administrator for our entity registration?**

**[https://www.fsd.gov/gsafsd\\_sp?id=kb\\_article\\_view&sysparm\\_article=KB0016652](https://www.fsd.gov/gsafsd_sp?id=kb_article_view&sysparm_article=KB0016652)**



## Registration Tips

### What to do if no one has the Entity Administrator role

The Federal Service Desk, [FSD.gov](https://www.fsd.gov), can help you establish a new Entity Administrator.

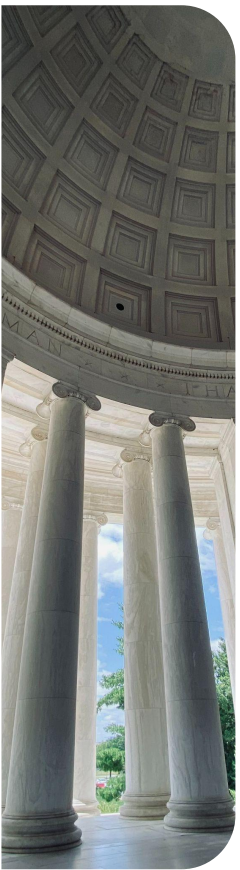
Go to [FSD.gov](https://www.fsd.gov) and select the **Become an Entity Administrator** button on the homepage. Use the **letter template** provided. Follow the instructions to complete and submit your letter.

The FSD sends you an email once the letter review is complete, advising if you are approved or rejected and if corrections are required.

Entities based outside the United State **are not required** to notarize the letter.

Don't get stuck in this long process. Make sure **you assign more than one person the Entity Administrator role to your registration!**

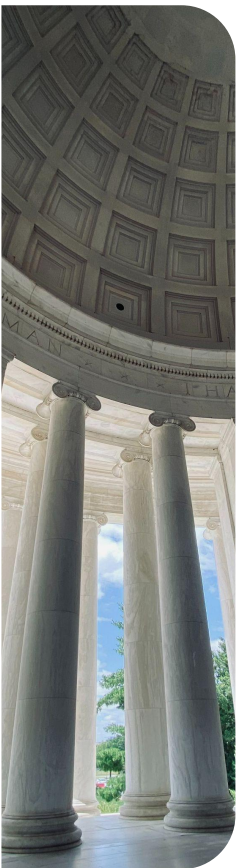




## Registration Tips

The **Government Business Point of Contact** must respond to emails from DLA requesting additional information within three business days.

- This is one of the required POCs you enter when registering in SAM.gov. This POC may not be the person who manages and submitted the registration in SAM.gov.
- If a submitted registration fails at DLA CAGE it is returned to “Work In Progress Registration” status. DLA CAGE will not be able to process any CAGE updates or information unless the registration is resubmitted and back at DLA CAGE for processing.



# Registration Tips

## IRS and DLA Verification

**The IRS verifies your organization's TIN and taxpayer name.**

- Your **taxpayer name** and **legal business name** may not be the same.
- The Taxpayer Name should be what is on your organization's most recent tax return.
- If you recently requested a new TIN, you may need to wait several business days for the IRS to update their records before you register in SAM.gov

**The Defense Logistics Agency (DLA) verifies your CAGE code.**

- DLA verifies your **legal business name** and **physical address** must match between SAM.gov and their sources.
- CAGE codes are assigned to entities registering to bid on government contracts (All Awards) and applying for grants from the Department of Defense (DOD).
- If you are registering for grants (Financial Assistance Awards) and you are not seeking DOD grants, you are not required to have a CAGE code.

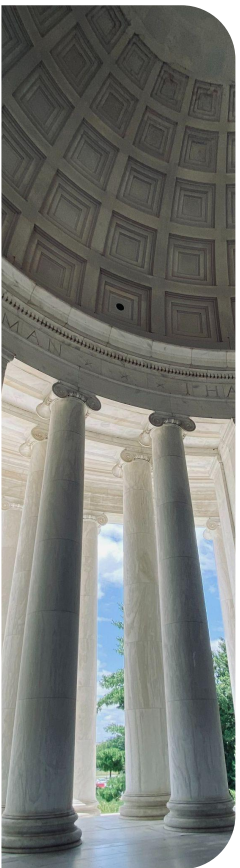


# Validation Tips



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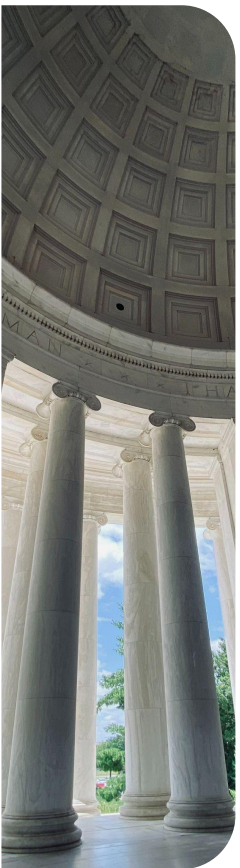


## Validation Tips

What can I do to quickly and successfully validate my entity?

If you are required to provide documents that prove your entity name, physical address, start year, or national identifier number, you should:

- **Use acceptable documents.** We have a list of what types of documents EVS accepts for validation on FSD.gov. The list is linked in several places on entity validation pages in SAM.gov too.
- Use documents that show the **same name and physical address as you entered** in SAM.gov.
- **Respond promptly to emails** from the Federal Service Desk about your validation case. Validation agents will reach out with questions and to notify you if your validation is approved or rejected. If they ask for more information and you do not respond within 5 business days, your case may close.



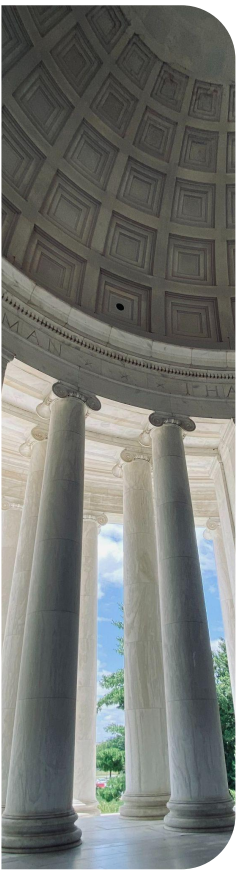
# What documents can I use for validation?

Document Name	Must be Less Than 5 Years Old?	OK for Legal Business Name and Physical Address?	OK for Start Year and State of Incorporation? (must have date)
Articles of Incorporation / Organization / Formation (if stamped as filed with an authority)	NO	YES	YES
Bank Statements (redact information that isn't necessary for validation)	YES	YES	NO
Bylaws for your company (if stamped as filed with an authority)	NO	YES	YES
Certificate of Formation / Organization (if stamped as filed with an authority)	NO	YES	YES
City Business Tax Certificate	YES	YES	NO
Department of Treasury IRS letter assigning your EIN	NO	YES	YES
Department of Treasury IRS Tax Exemption Status Letter	YES	YES	NO
IRS Form 8822-B or Form 990 for address change (filed only)	NO	YES	NO
IRS Forms marked as received by the IRS or processed by a CPA or e-filing software (e.g. Form 1040 with schedule C for sole proprietors)	YES	YES	YES
IRS Forms 1099 if you are the recipient (not the filer)	YES	YES	NO
Secretary of State Certificate of Filing	NO	YES	YES
Screenshot/PDF file of your business profile in your state's online business registry or Secretary of State website (must be current registration and must include the registry URL)	Within last 12 months	YES	YES
Screenshots of other websites containing your business information, including but not limited to federal websites, SAM.gov, IRS.gov, dla.CAGE.mil, etc	N/A	NO	NO
Town charter, documentation from state governments for town existence; Governor's declarations; formal resolution from town council establishing office	NO	YES	YES
Utility Bills (water, gas, or electric only)	YES	YES	NO
W-9	N/A	NO	NO



Get a comprehensive list of acceptable and unacceptable documents at:

[https://www.fsd.gov/gsafsd\\_sp?id=kb\\_article\\_view&sysparm\\_article=KB0055230](https://www.fsd.gov/gsafsd_sp?id=kb_article_view&sysparm_article=KB0055230)



## Common Registration and Validation Pain Points

- Getting documents that show an entity name that matches validation sources.
- Using a PO Box or virtual address for a physical address.
- Perception that validation or getting a new Unique Entity ID are required every year.
  - Only registration renewal is required each year to keep your record active.
  - **The Unique Entity ID is forever**, no matter what status your registration is in.
- Registering for All Awards when you only need a Financial Assistance Only registration.
- Assign more than one Entity Administrator!

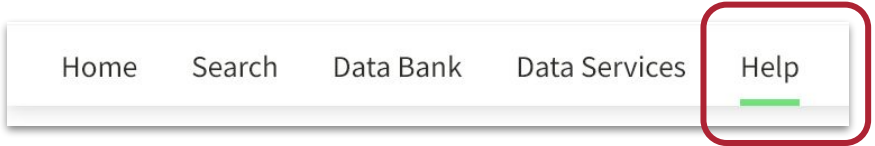
# Getting Help for SAM.gov



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# Help on SAM.gov



## Explore popular help topics

- Help For Non-Federal Users
- Help For Federal Users
  - ▶ New to SAM.gov
  - Using Workspace
  - Managing and Requesting Roles in SAM.gov
  - Searching for Information in SAM.gov
  - Managing Contract Opportunities
  - Managing Assistance Listings
  - Managing Exclusions in SAM.gov
  - Managing Entity Reporting
  - Managing the Federal Hierarchy
  - Managing My Federal Entity
- User Community

### ■ New to SAM.gov?

If you're new to SAM.gov, review this menu for information about how to start your account. Other topics on this help landing page provide details about things you can do in SAM.gov.

- ? [Do I need an account to use SAM.gov?](#)
- ? [What's the difference between signing up and registering?](#)
- ? [How to use login.gov with SAM.gov](#)
- ? [What is a domain?](#)
- ? [What happens to my SAM.gov access if I change my email address on login.gov?](#)





# Help at the Federal Service Desk

The screenshot shows the homepage of the Federal Service Desk. At the top left is the 'fsd.gov' logo. At the top right is a badge that reads 'Official U.S. Government Website 100% Free'. The main heading is 'Federal Service Desk', followed by the text 'Start here for help on SAM.gov, FPDS.gov, eSRS.gov, and FSRS.gov'. Below this is a search bar with the placeholder text 'Search' and a magnifying glass icon. To the right of the search bar is a section for 'SAM.GOV' with the text 'Why is my entity Validation Incident in both SAM.gov and FSD.gov?' and a green button labeled 'Entity Validation Help'. At the bottom left, there is a section titled 'Learn How to Register Your Entity' with six blue buttons: 'Get Started with Your Registration', 'Check Registration Status', 'Update Your Registration', 'Become an Entity Administrator', 'For State and Local Entities', and 'Access User Guides'.

The Federal Service Desk at FSD.gov is the help desk for SAM.gov.

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Our entire knowledge base for SAM.gov, and other IAE systems, is searchable here.

Enter keywords to explore help articles, videos, glossary terms, guides, and more.

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Use the **Entity Validation Help** button to view a comprehensive list of help topics related to validation.

# Help at the Federal Service Desk

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Use the buttons in the **Learn How to Register Your Entity** section to view registration help specific to you.

# Help at the Federal Service Desk

The screenshot displays the FSD.gov help page layout. On the left is a vertical list of help topics, each with a small icon and a text label. The topics include Entity Registration, Contract Opportunities, SAM.gov Data Services, Workspace, Federal Hierarchy, Fraud, Entity Reporting, Wage Determinations, SAM.gov Site Information, Login.gov, FOIA Requests, Assistance Listings, SAM.gov User Accounts, Contract Data, and SAM.gov Search. At the bottom of this list is a 'Show More' button with the text 'Showing 15 categories'. To the right of the topics is an 'Announcements' section with three entries. The first entry is 'Entity Validation Review Time', the second is 'Refine Your Search Results with the New Search Editor', and the third is 'Download FASCSA Orders from SAM.gov'. Each announcement includes a brief description and a 'Click here to learn more' link. At the bottom of the page is a light blue section titled 'Still have a question?' which contains a paragraph of text and two green buttons: 'Create an Incident' and 'Live Chat'.

Help Topics (FAQs)

- Entity Registration
- Contract Opportunities
- SAM.gov Data Services
- Workspace
- Federal Hierarchy
- Fraud
- Entity Reporting
- Wage Determinations
- SAM.gov Site Information
- Login.gov
- FOIA Requests
- Assistance Listings
- SAM.gov User Accounts
- Contract Data
- SAM.gov Search

Show More  
Showing 15 categories

Announcements

**Entity Validation Review Time**  
Entity validation review time will depend on whether we can make a match from your original document submission, or if we need to request additional documentation. Most entities find a match immediately, but in some cases additional documentation and a manual review is required. The average manual review time is currently five (5) days.  
[Click here to learn more](#)

**Refine Your Search Results with the New Search Editor**  
If you use Simple Search in SAM.gov today, you can continue to search as you normally do. Simple Search will remain the default. If you know how to use Boolean search phrases (advanced formulas used with special terms along with keywords), you can now use them with the new search editor in the SAM.gov Search.  
[Click here to learn more!](#)

**Download FASCSA Orders from SAM.gov**  
The FASCSA order rule is in effect. Use the new download button on SAM.gov to get a list of all FASCSA orders. We will show an alert to let you know the file is empty until agencies issue orders. See our [blog](#) for more details.  
[Click here to learn more](#)

Still have a question?  
If you are unable to find an answer to your question using search knowledge base or help topics, you can select **Create an Incident** to login and submit a ticket or you can select **Live Chat** to login and chat with the FSD Service Desk.

[Create an Incident](#) [Live Chat](#)

Scroll down the FSD.gov home page to view more ways to get help.

# Help at the Federal Service Desk

The screenshot displays the Federal Service Desk interface. On the left is a vertical list of help topics, each with a plus icon for expansion. The topics include Entity Registration, Contract Opportunities, SAM.gov Data Services, Workspace, Federal Hierarchy, Fraud, Entity Reporting, Wage Determinations, SAM.gov Site Information, Login.gov, FOIA Requests, Assistance Listings, SAM.gov User Accounts, Contract Data, and SAM.gov Search. A 'Show More' link indicates 15 categories are shown. The main content area features three announcements: 'Entity Validation Review Time' (explaining manual review processes), 'Refine Your Search Results with the New Search Editor' (introducing Boolean search), and 'Download FASCSA Orders from SAM.gov' (detailing order rule changes). At the bottom, a 'Still have a question?' section provides instructions on using search, creating incidents, or using live chat, accompanied by two green buttons: 'Create an Incident' and 'Live Chat'.

Help Topics (FAQs)

- Entity Registration
- Contract Opportunities
- SAM.gov Data Services
- Workspace
- Federal Hierarchy
- Fraud
- Entity Reporting
- Wage Determinations
- SAM.gov Site Information
- Login.gov
- FOIA Requests
- Assistance Listings
- SAM.gov User Accounts
- Contract Data
- SAM.gov Search

Show More  
Showing 15 categories

Announcements

**Entity Validation Review Time**  
Entity validation review time will depend on whether we can make a match from your original document submission, or if we need to request additional documentation. Most entities find a match immediately, but in some cases additional documentation and a manual review is required. The average manual review time is currently five (5) days.  
[Click here to learn more](#)

**Refine Your Search Results with the New Search Editor**  
If you use Simple Search in SAM.gov today, you can continue to search as you normally do. Simple Search will remain the default. If you know how to use Boolean search phrases (advanced formulas used with special terms along with keywords), you can now use them with the new search editor in the SAM.gov Search.  
[Click here to learn more!](#)

**Download FASCSA Orders from SAM.gov**  
The FASCSA order rule is in effect. Use the new download button on SAM.gov to get a list of all FASCSA orders. We will show an alert to let you know the file is empty until agencies issue orders. See our [blog](#) for more details.  
[Click here to learn more](#)

Still have a question?  
If you are unable to find an answer to your question using search knowledge base or help topics, you can select **Create an Incident** to login and submit a ticket or you can select **Live Chat** to login and chat with the FSD Service Desk.

[Create an Incident](#) [Live Chat](#)

Select **Help Topics** to view the most viewed and highest rated help topics in each category.

# Help at the Federal Service Desk

The screenshot displays the Federal Service Desk interface. On the left is a sidebar menu with categories such as 'Help Topics (FAQs)', 'Entity Registration', 'Contract Opportunities', 'SAM.gov Data Services', 'Workspace', 'Federal Hierarchy', 'Fraud', 'Entity Reporting', 'Wage Determinations', 'SAM.gov Site Information', 'Login.gov', 'FOIA Requests', 'Assistance Listings', 'SAM.gov User Accounts', 'Contract Data', and 'SAM.gov Search'. Below the menu is a 'Show More' link indicating 'Showing 15 categories'. The main content area features 'Announcements' with three items: 'Entity Validation Review Time', 'Refine Your Search Results with the New Search Editor', and 'Download FASCSA Orders from SAM.gov'. Each announcement includes a brief description and a 'Click here to learn more' link. At the bottom, a light blue footer contains the text 'Still have a question?' followed by instructions on how to use search, 'Create an Incident', and 'Live Chat' buttons.

Help Topics (FAQs)

- Entity Registration
- Contract Opportunities
- SAM.gov Data Services
- Workspace
- Federal Hierarchy
- Fraud
- Entity Reporting
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[Create an Incident](#) [Live Chat](#)

If you still need help, sign in to FSD.gov (using your login.gov email and password) to **chat live with a help desk agent** or to **submit your issue** via a web form.



U.S. General Services Administration

**Thank you!**



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