Step-by-step Guide for Receiving a Unique Entity Identifier (UEI) with SAM.gov

Prepared by the Worcester Regional Chamber of Commerce for the purposes of the City of Worcester's ARPA grant programs

August 2022

WORCESTER REGIONAL
CHAMBER OF COMMERCE
RECRUIT | RETAIN | INCUBATE

Initial Questions Answered

What is SAM.gov?

SAM stands for the System for Award Management. SAM.gov is the federal government's database for getting money from federal grants, contracts, and aid to legally recognized sole proprietors or organizations.

What is a Unique Entity Identifier (UEI)?

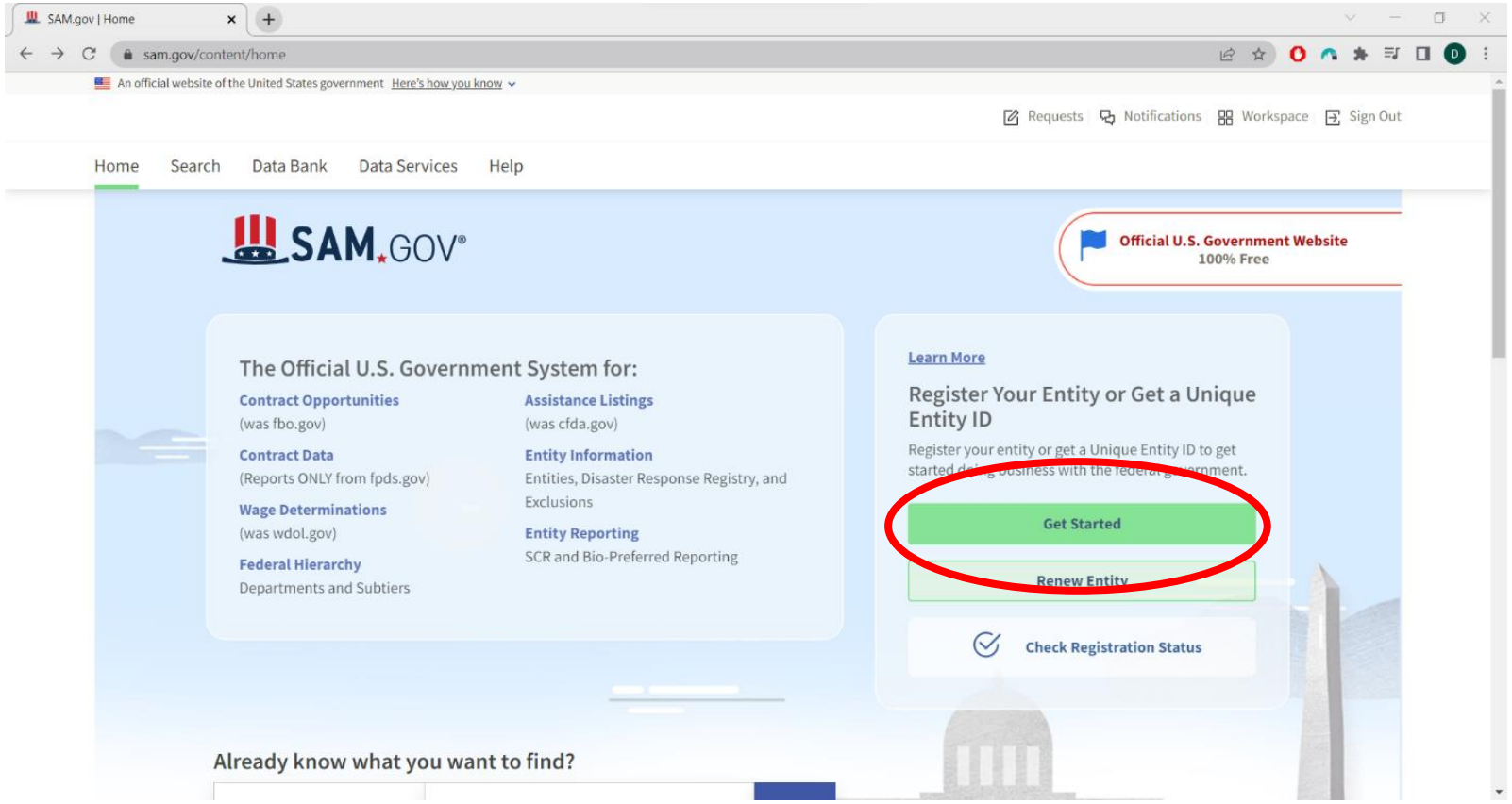
A UEI is a number assigned to a legally registered sole proprietor or organization (referred to as an "entity") when they sign up for one on SAM.gov. Before an organization can receive a UEI, they must first be verified by providing some type of official documentation and complete a registration process in SAM.gov. Once verified and registered, the federal government can then disburse federal award money to organizations with a UEI.

Why do I need a UEI?

All entities receiving federal money must have a UEI so that the award transfer may take place. The City of Worcester's ARPA grant programs are federally funded.

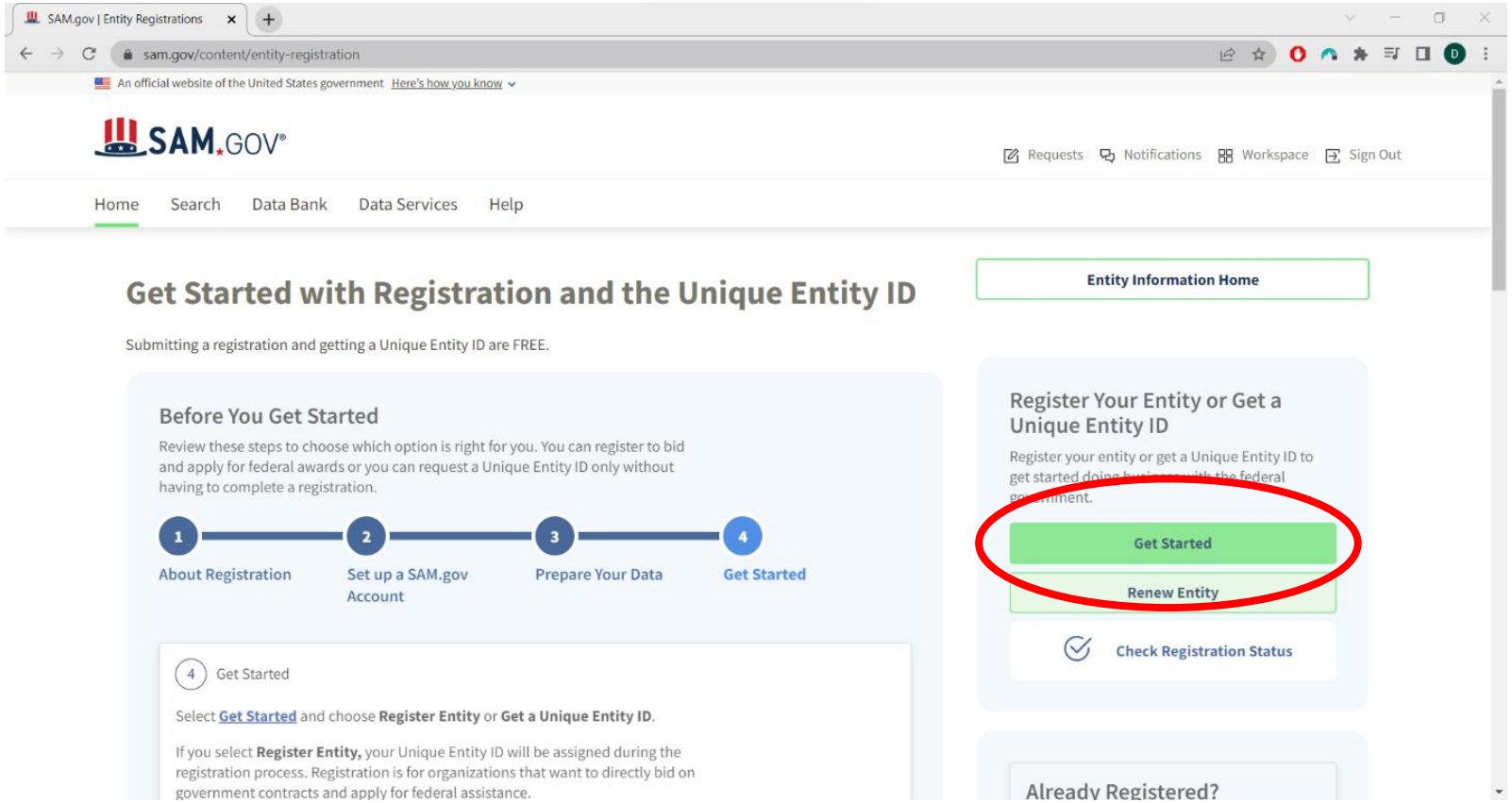
Getting Started

1. On your web browser, **go to SAM.gov.** Follow the instructions to create an account. SAM.gov requires you to do a two-step verification process every time you log in, so make sure the phone number you list is one that you have easy access to so you can receive a text with a verification code for any time when you attempt to login.
2. Once you have created an account and logged in, click the green button **Get Started** on the homepage.



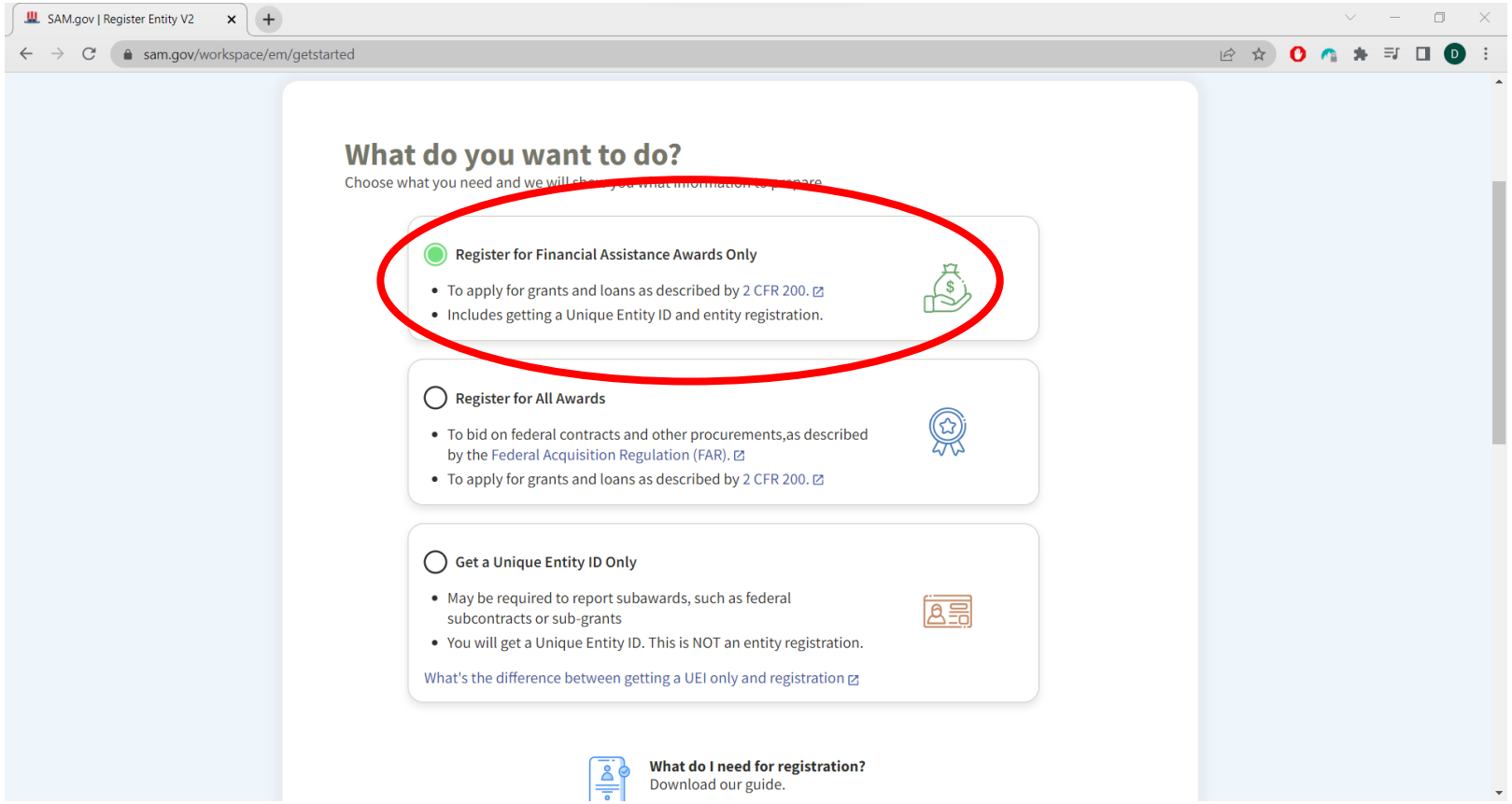
Getting Started

3. Click again on the green button **Get Started**.



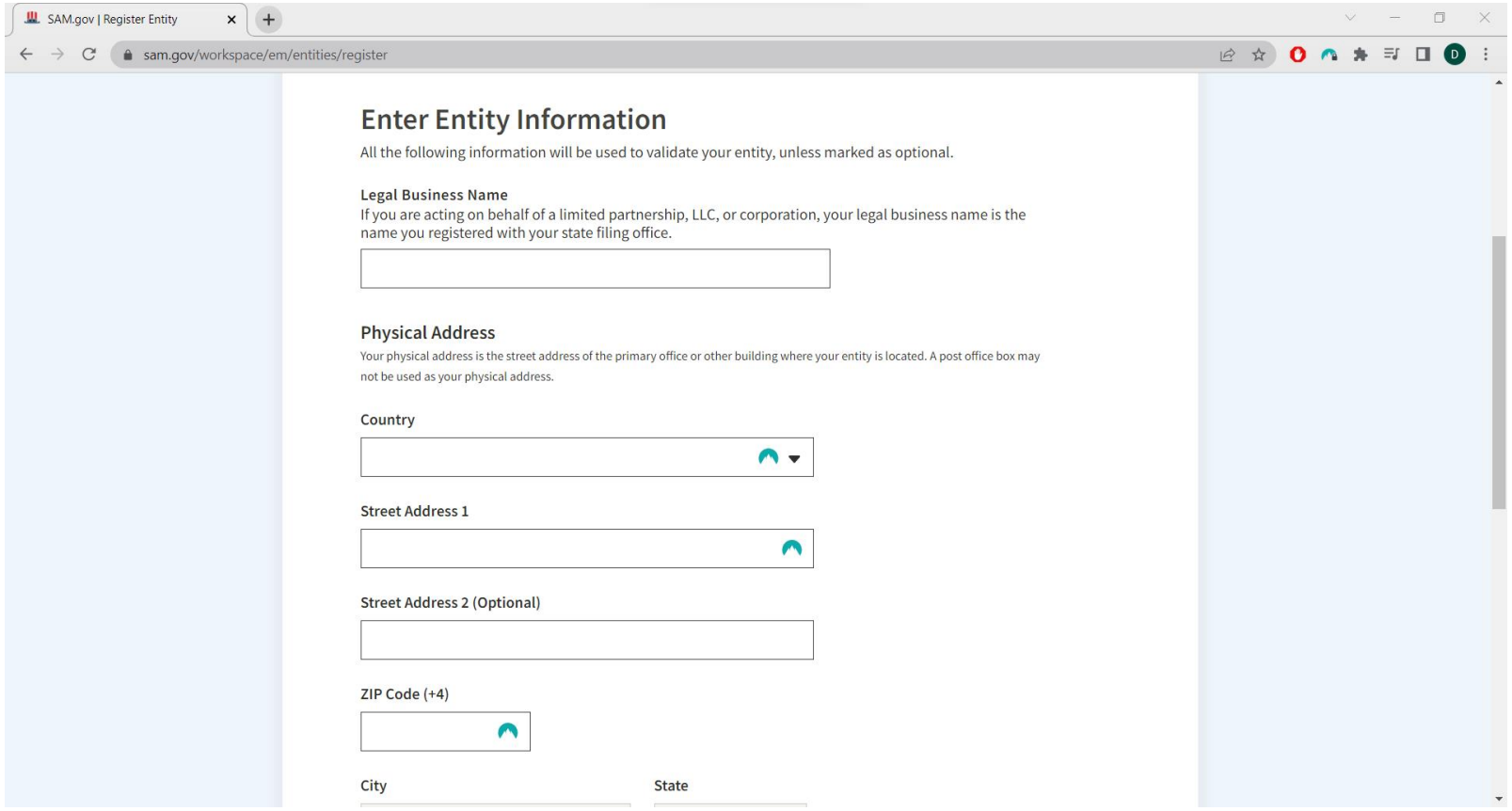
Getting Started

4. When presented with this page, select the bottom option, **Register for Financial Assistance Awards Only**. This will register your entity to receive federal money through government grants and loans.



Searching for Your Organization in the Database

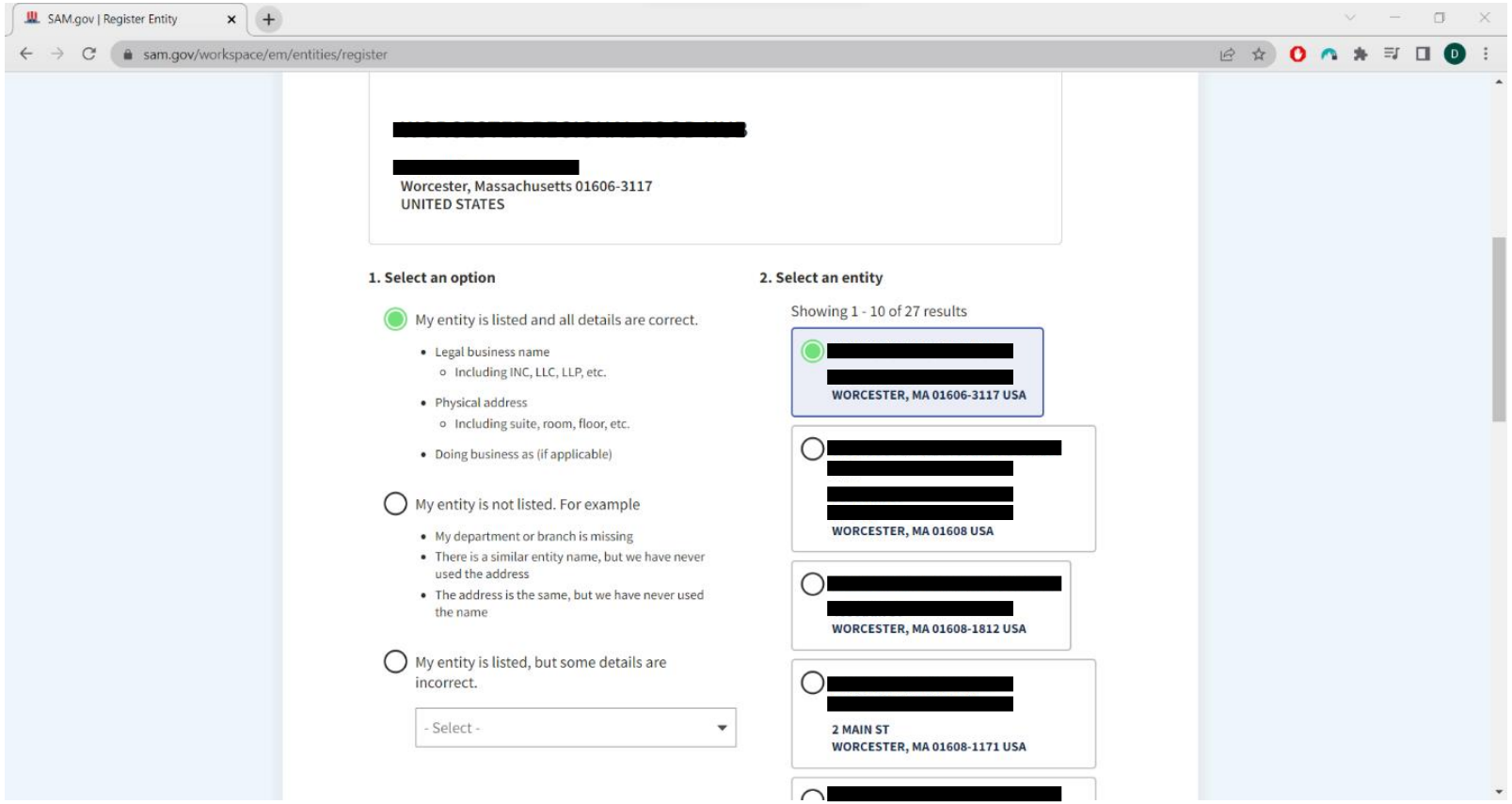
5. Proceed through the next steps. When presented with this page, provide the requested information for your organization. Click the **Next** button at the bottom when done to begin a search in the federal government's database.



Searching for Your Organization in the Database

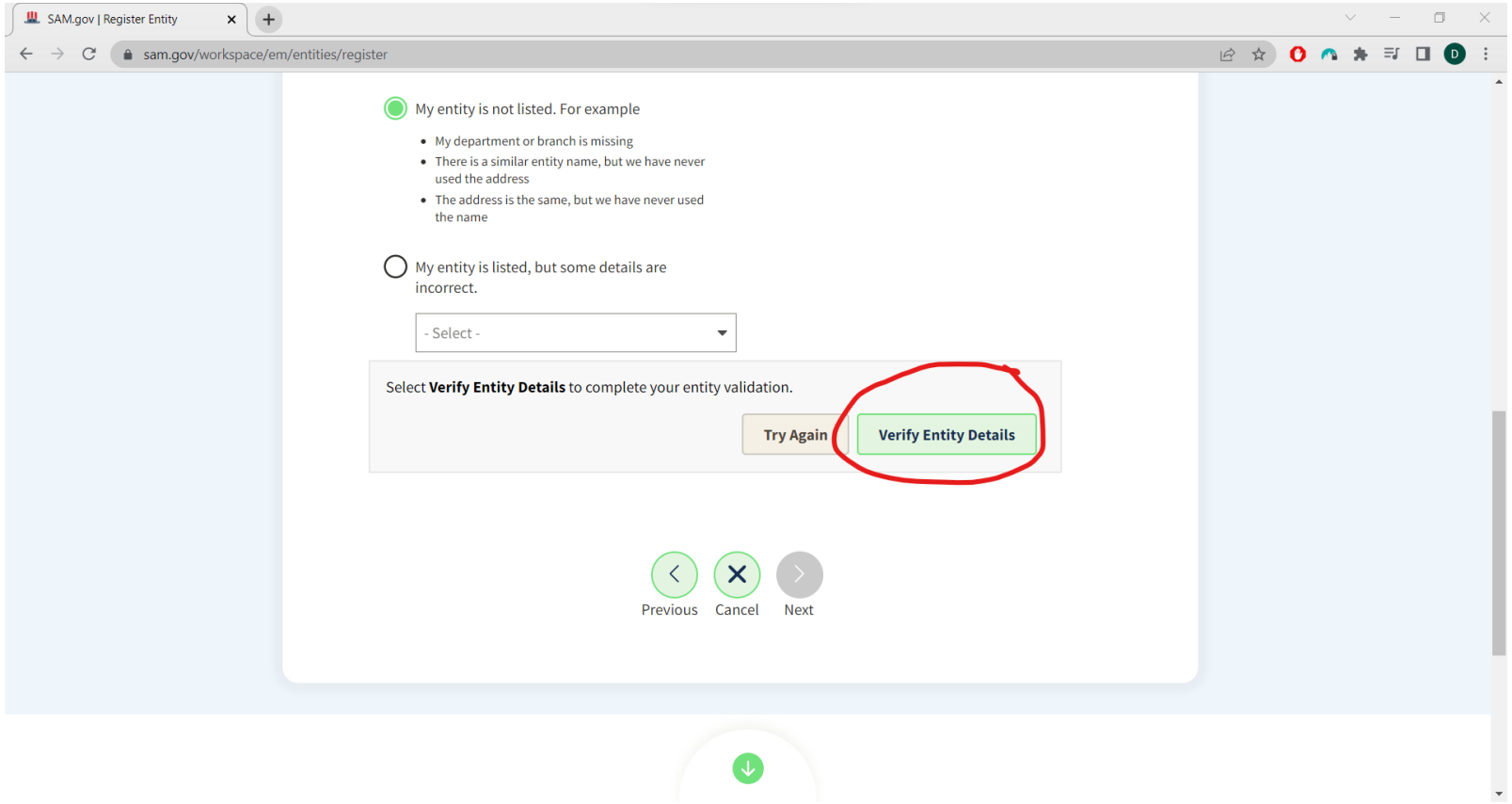
6. A list of entities that match the information you entered will pop up. If your entity appears with the correct information, select the option **My entity is listed and all details are correct** and then select the correct option. If not, select **My entity is not listed** and proceed to verify your entity. If your entity appears with a past address or name that is no longer correct, select **My entity is listed, but some details are incorrect**.

7. If your entity popped up as an option and you selected **My entity is listed**, proceed as instructed. You will not need to verify.



Verifying Your Organization

8. If your entity did NOT pop up as an option, select **My entity is not listed**. If your entity DID pop up but you need to change how your entity appears in the federal database – i.e. it displays an outdated name or address – select **My entity is listed, but some details are incorrect**. In both cases, click the green button **Verify Entity Details** at the bottom of the page and proceed.



9. A mini window will pop up asking you to attach a file which has official, legal documentation that can help the federal government verify your entity's legal existence or new details.

IMPORTANT: See next page for a list of acceptable and unacceptable documents to attach.

Verifying Your Organization

Documents to Validate **Legal Business Name and Physical Address**

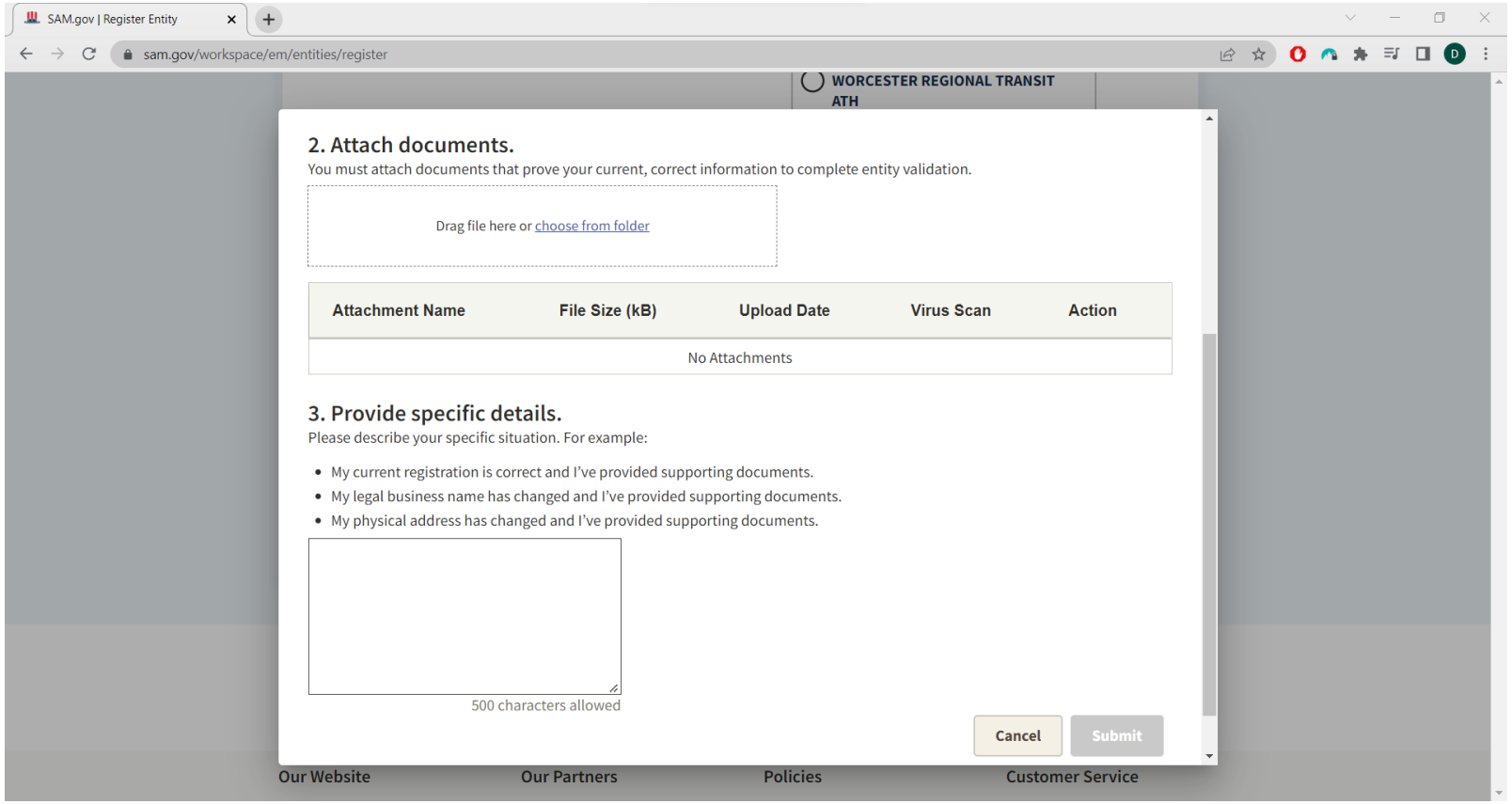
Entity Type	✓ Attach These **Acceptable** Documents (examples)	— Unacceptable Documents - **Do Not Attach**

All Entities	• Certified copies of the following:
	  • Share certificates
	  • Articles of organization/incorporation
	  • Tax returns/filings*
	  • Certificate of formation
	  • Articles of formation
	  • Certificate of organization
	• Utility bills
	• Bank statements*
	• "Doing business as" documentation
	• Stock ownership
	• Employer Identification Number documentation from IRS
	• Tax ID confirmation documents from IRS
	• Company bylaws
	• Operating agreements
	• Non-expired driver's license (does not need to be a REAL ID)—sole proprietors and individuals doing-business-as only
		• Applications you submitted without evidence of receipt or approval from an authority
		• Your own documents that have not been stamped or verified by an authority
		• Screenshots from SAM.gov, dla.CAGE.mil, or any other government system that stores your name and address
		• Federal contract or grant award documents
		• DUNS profiles
		• Notarized entity administrator letters
		• IRS form W-9 (request for Taxpayer Identification Number) and IRS form SS4 (application for an Employer Identification Number)
		• Leases
		• Passports, unless they include the current physical address

This is a list of examples. We accept documentation from state or federal verifiers (or a city/county in rare cases of at-home businesses that would involve an address validation), or a utility that requires a credit verification. We do not accept documentation that does not have proof that it was certified or validated by an authority.
*Tax returns or filings and bank statements should be redacted or limited; they only need to show relevant data to prove the information you are validating is true.

Verifying Your Organization

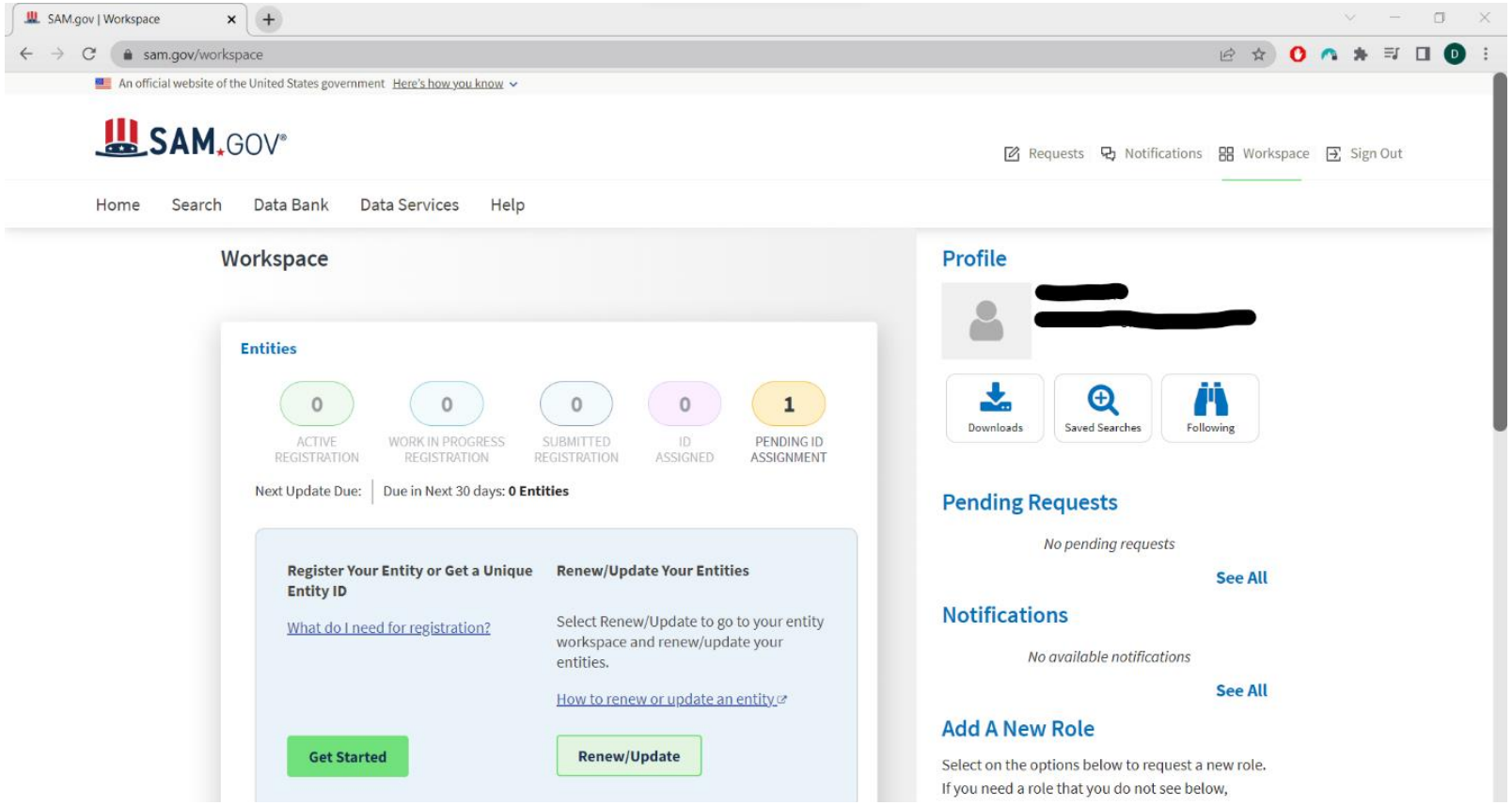
10. Attach the legal document and then type in the box **Provide specific details** to help the verifying staff member in the federal government determine what the problem is. Once you click **Submit** in the mini window, you have submitted your request for verification. Allow for several business days for the information to be verified.



Completing the Core Data Questionnaire

12. Your **Workspace** page, which is just your profile, will display a **Pending ID Assignment** until you are verified and receive a UEI. Proceed to the **Core Data** questionnaire by clicking on the Pending ID Assignment bubble and then clicking on the name of your organization. This is a series of questions that will finalize your registration. For the questionnaire, you will need:

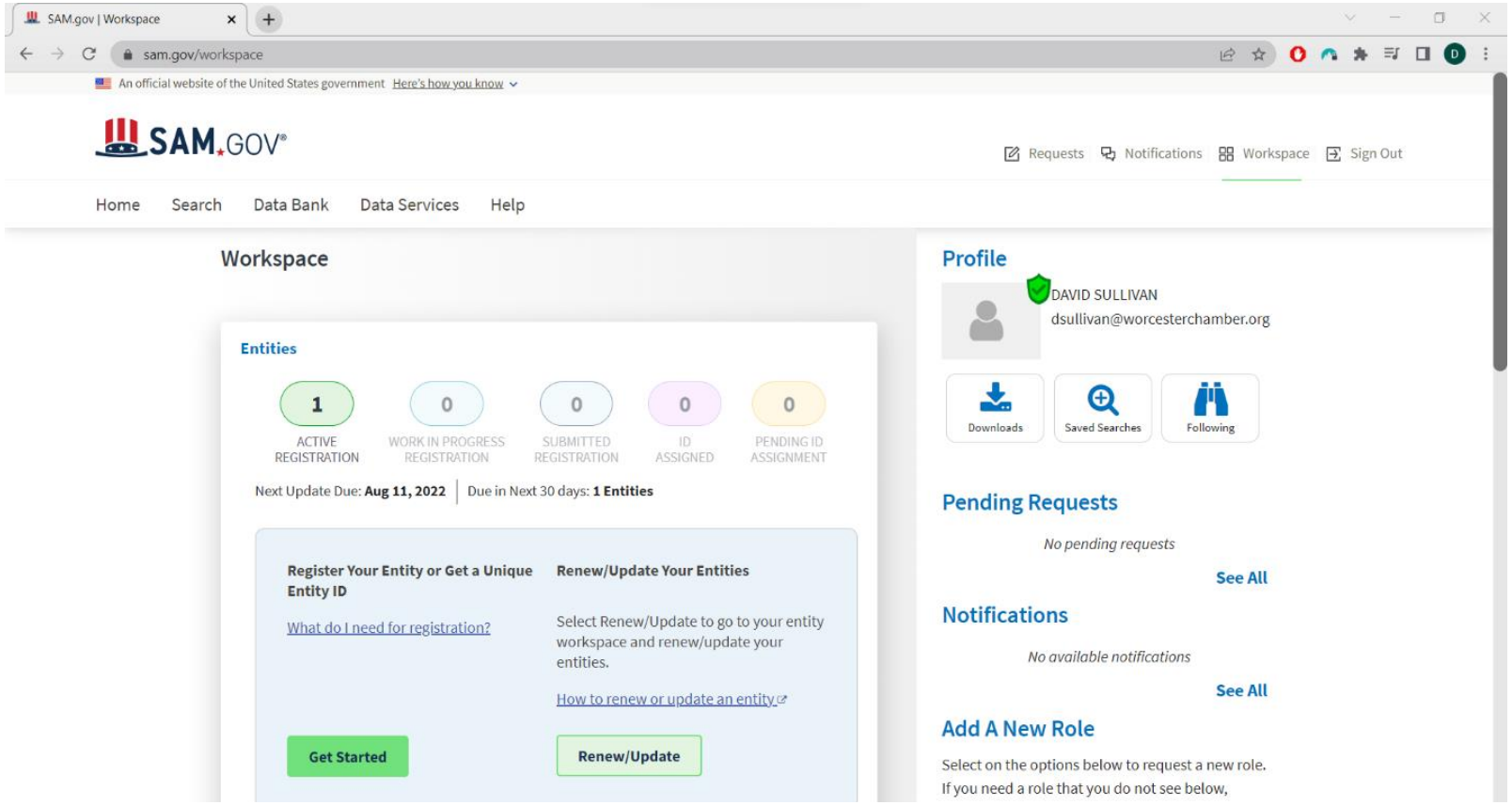
   a. The **date of incorporation** for your entity.
   b. Your **Employer Identification Number (EIN)** in an IRS document or your Social Security Number if you do not have an EIN.
   c. Your entity's **bank account information**.
   d. Make sure to not only do the **Core Data** section, but also the sections titled **Representations and Certifications**, **Points of Contact**, and finalize the submission under **Submit Registration**.



Completing the Process

13. Once you receive your UEI, your entity will display as an **Active Registration** in your Workspace page. Once you see this, you now have set up your UEI. You can find it by clicking on the green Active Registration bubble.

IMPORTANT: Note that SAM.gov will give you your UEI once they verify your entity. However, this does not mean your entity is registered. **You still must complete the Core Data questionnaire** before completing your registration. You will also need to **verify your identity** on SAM.gov with a driver's license or other form of government ID. You will need to complete this registration and identity verification in order to qualify to receive federal money.



Other Important Information

IF YOU STILL NEED HELP:

1. The City of Worcester has also put out a walkthrough guide on receiving a UEI.

2. Refer to this official walkthrough video series by the federal government:
    - Get a Unique Entity ID
    - Entity Registration and Entity Management
    - Entity Registration – Core Data

3. If the above guides are not helpful, contact David Sullivan, Director of Economic Development & Business Recruitment at the Worcester Regional Chamber of Commerce (dsullivan@worcesterchamber.org / 508-753-2924).

IMPORTANT: Your SAM.gov registration must be renewed each year if you plan on receiving federal money in the future. Third-party consultants who know your registration is up for renewal may reach out to you around the one-year mark offering to do it for you. **Renewing SAM.gov registration by yourself is completely free** but you may elect to hire a consultant to help you if you want.