

# **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**  
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# 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)?**

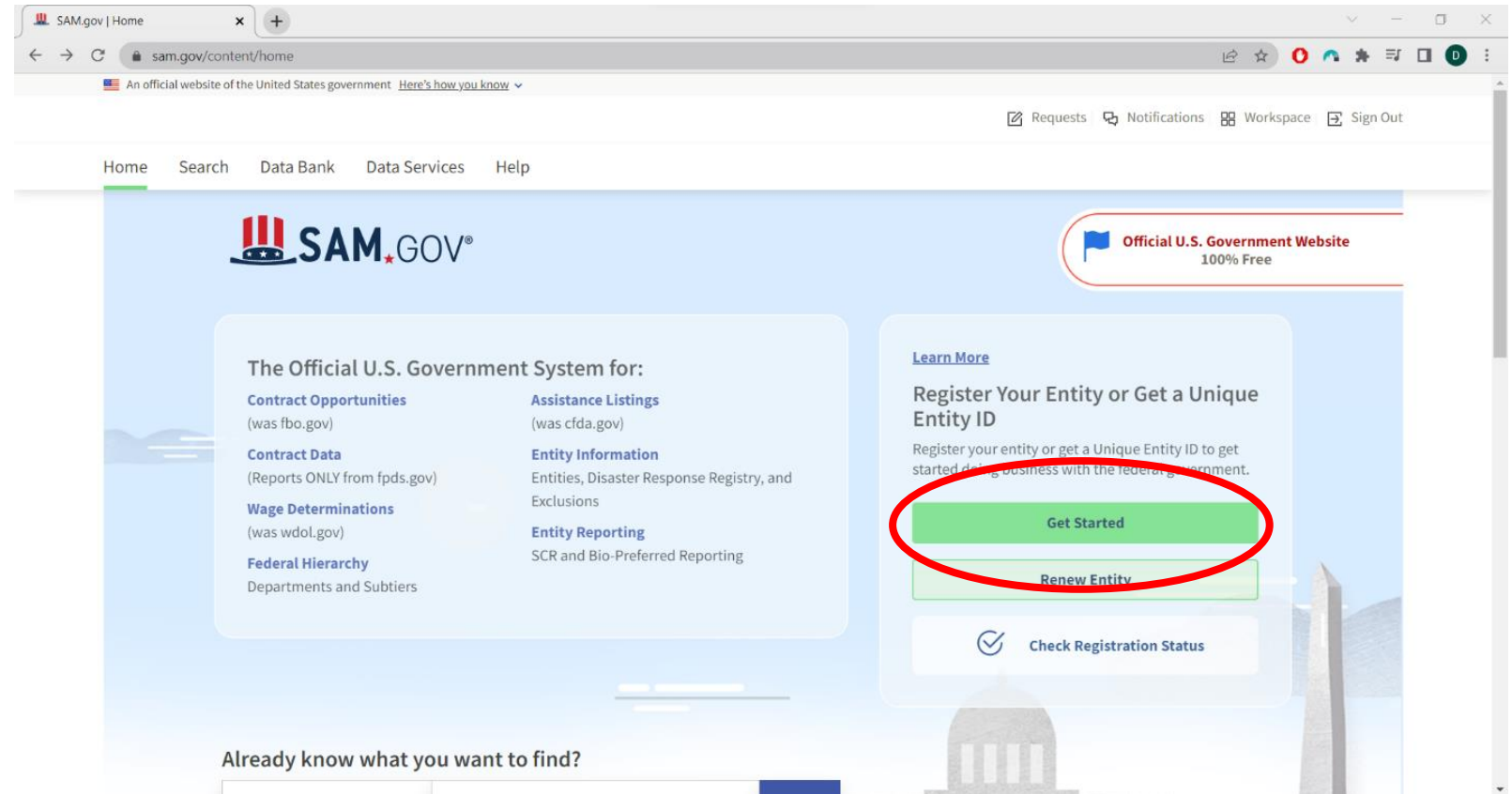
A UEI is a number assigned to a legally registered sole proprietor or organization (referred to as an "entity") when they sign up for one on SAM.gov. Before an organization can receive a UEI, they must first be verified by providing some type of official documentation and complete a registration process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

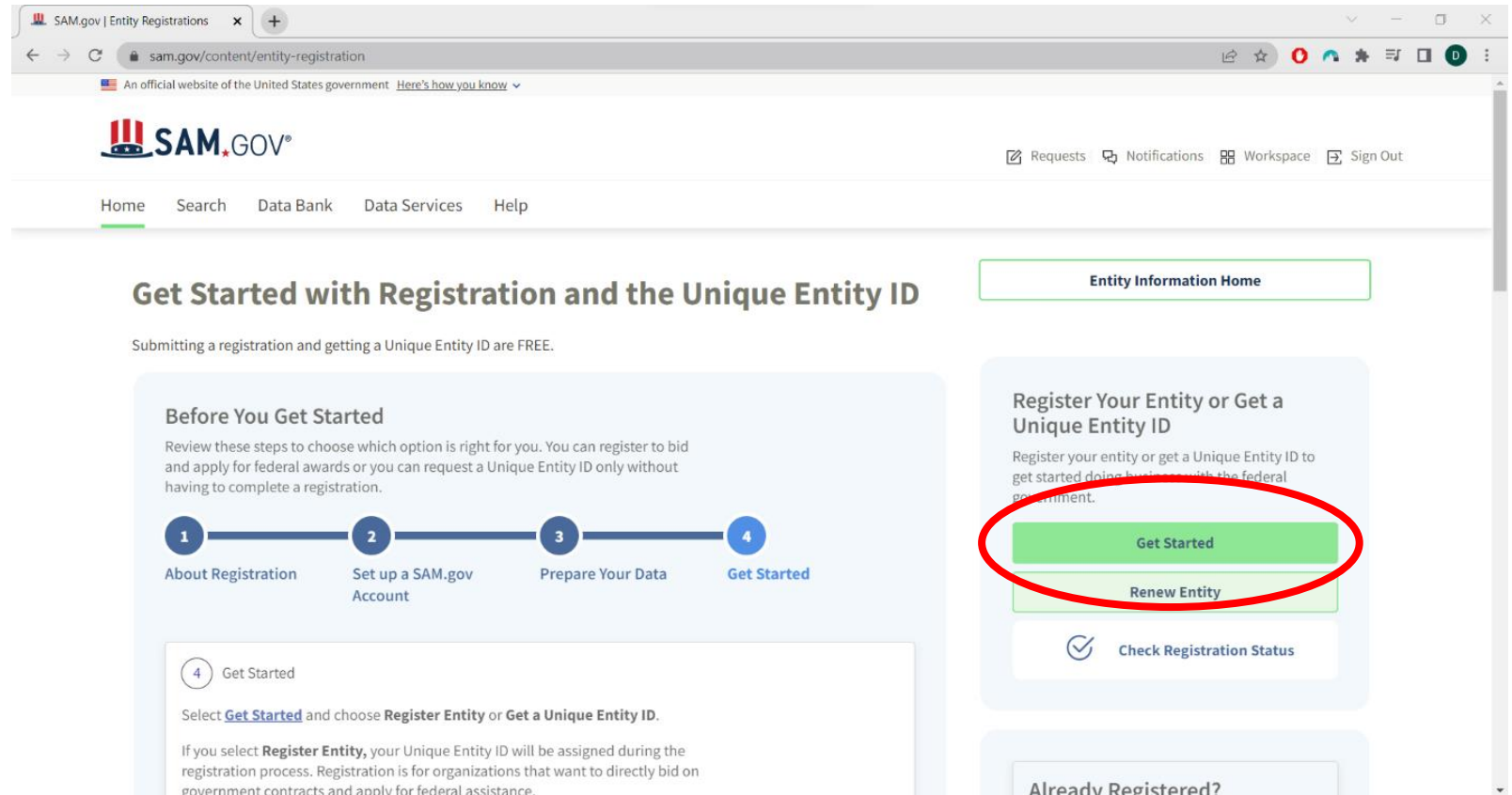
# Getting Started

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**.



The screenshot shows the SAM.gov Entity Registration page. The browser address bar displays "sam.gov/content/entity-registration". The page header includes the SAM.gov logo and navigation links: Home, Search, Data Bank, Data Services, and Help. A secondary header contains links for Requests, Notifications, Workspace, and Sign Out. The main content area is titled "Get Started with Registration and the Unique Entity ID" and includes a sub-header "Submitting a registration and getting a Unique Entity ID are FREE." Below this, a "Before You Get Started" section provides a four-step process: 1. About Registration, 2. Set up a SAM.gov Account, 3. Prepare Your Data, and 4. Get Started. The "Get Started" step is highlighted with a red circle. To the right, a "Register Your Entity or Get a Unique Entity ID" section contains a green "Get Started" button, a light green "Renew Entity" button, and a "Check Registration Status" link. A "Already Registered?" section is partially visible at the bottom.

SAM.gov | Entity Registrations

← → ↻ sam.gov/content/entity-registration

An official website of the United States government [Here's how you know](#)

**SAM.GOV**

Requests Notifications Workspace Sign Out

Home Search Data Bank Data Services Help

## Get Started with Registration and the Unique Entity ID

Submitting a registration and getting a Unique Entity ID are FREE.

### Before You Get Started

Review these steps to choose which option is right for you. You can register to bid and apply for federal awards or you can request a Unique Entity ID only without having to complete a registration.

- 1 About Registration
- 2 Set up a SAM.gov Account
- 3 Prepare Your Data
- 4 **Get Started**

4 Get Started

Select [Get Started](#) and choose **Register Entity** or **Get a Unique Entity ID**.

If you select **Register Entity**, your Unique Entity ID will be assigned during the registration process. Registration is for organizations that want to directly bid on government contracts and apply for federal assistance.

### Register Your Entity or Get a Unique Entity ID

Register your entity or get a Unique Entity ID to get started doing business with the federal government.

**Get Started**

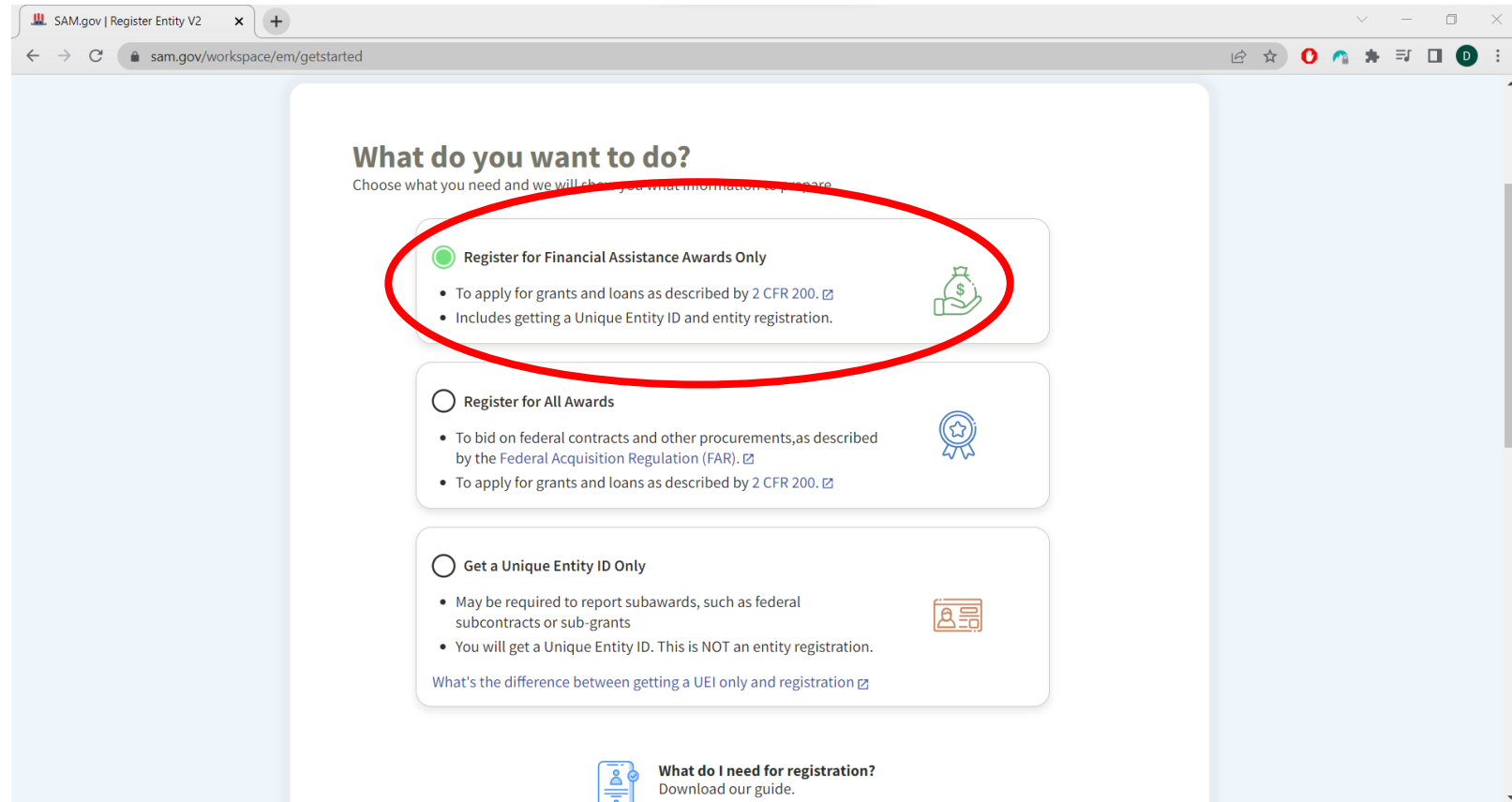
Renew Entity

✓ Check Registration Status

Already Registered?

## 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.







SAM.gov | Register Entity V2

← → ↻ sam.gov/workspace/em/getstarted

### What do you want to do?

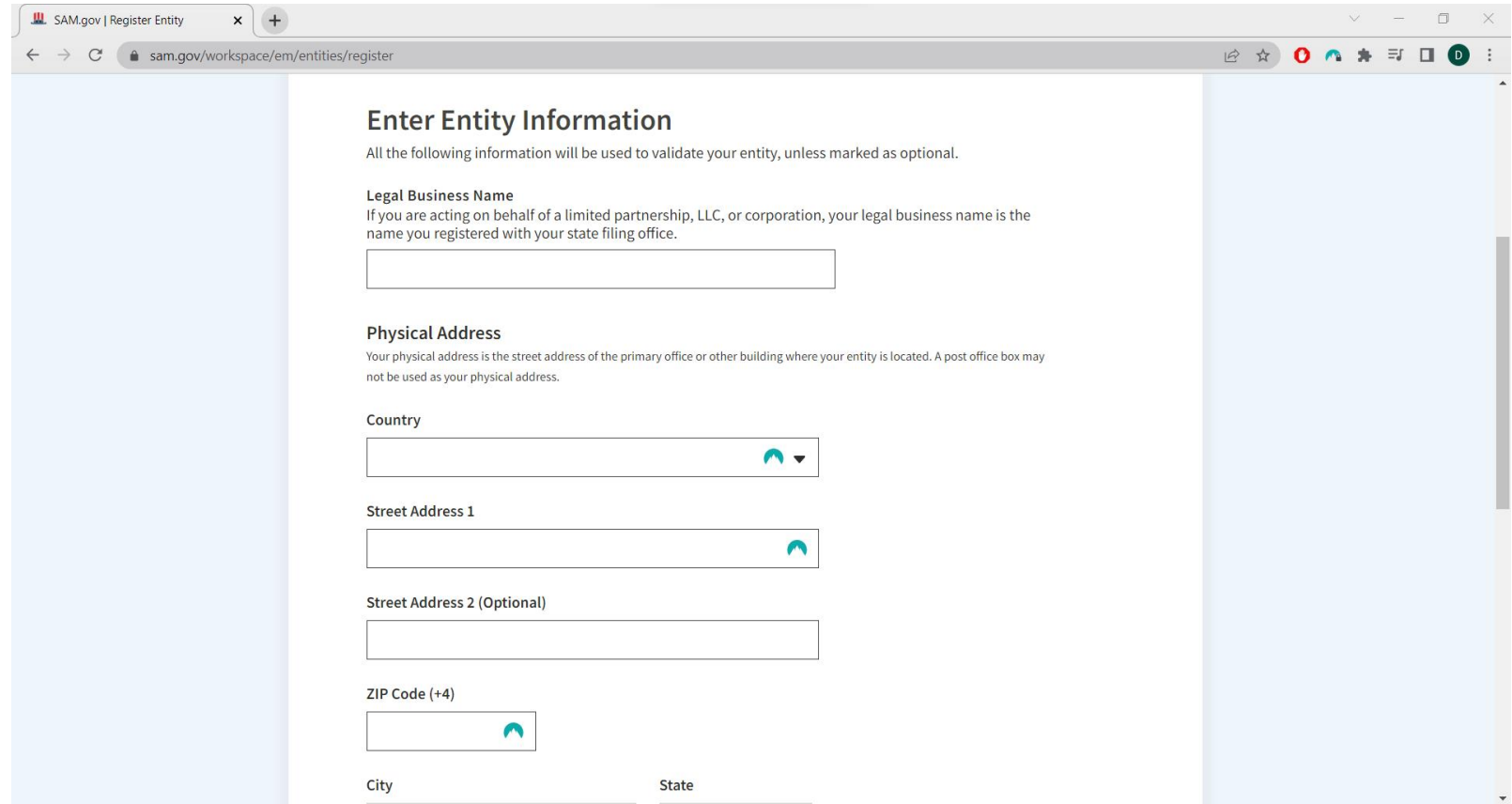
Choose what you need and we will charge you what information to prepare

- ☒ **Register for Financial Assistance Awards Only**
  - To apply for grants and loans as described by [2 CFR 200](#).
  - Includes getting a Unique Entity ID and entity registration.
- ☐ **Register for All Awards**
  - To bid on federal contracts and other procurements, as described by the [Federal Acquisition Regulation \(FAR\)](#).
  - To apply for grants and loans as described by [2 CFR 200](#).
- ☐ **Get a Unique Entity ID Only**
  - May be required to report subawards, such as federal subcontracts or sub-grants
  - You will get a Unique Entity ID. This is NOT an entity registration.  
[What's the difference between getting a UEI only and registration](#)

 **What do I need for registration?**  
Download our guide.

# 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.



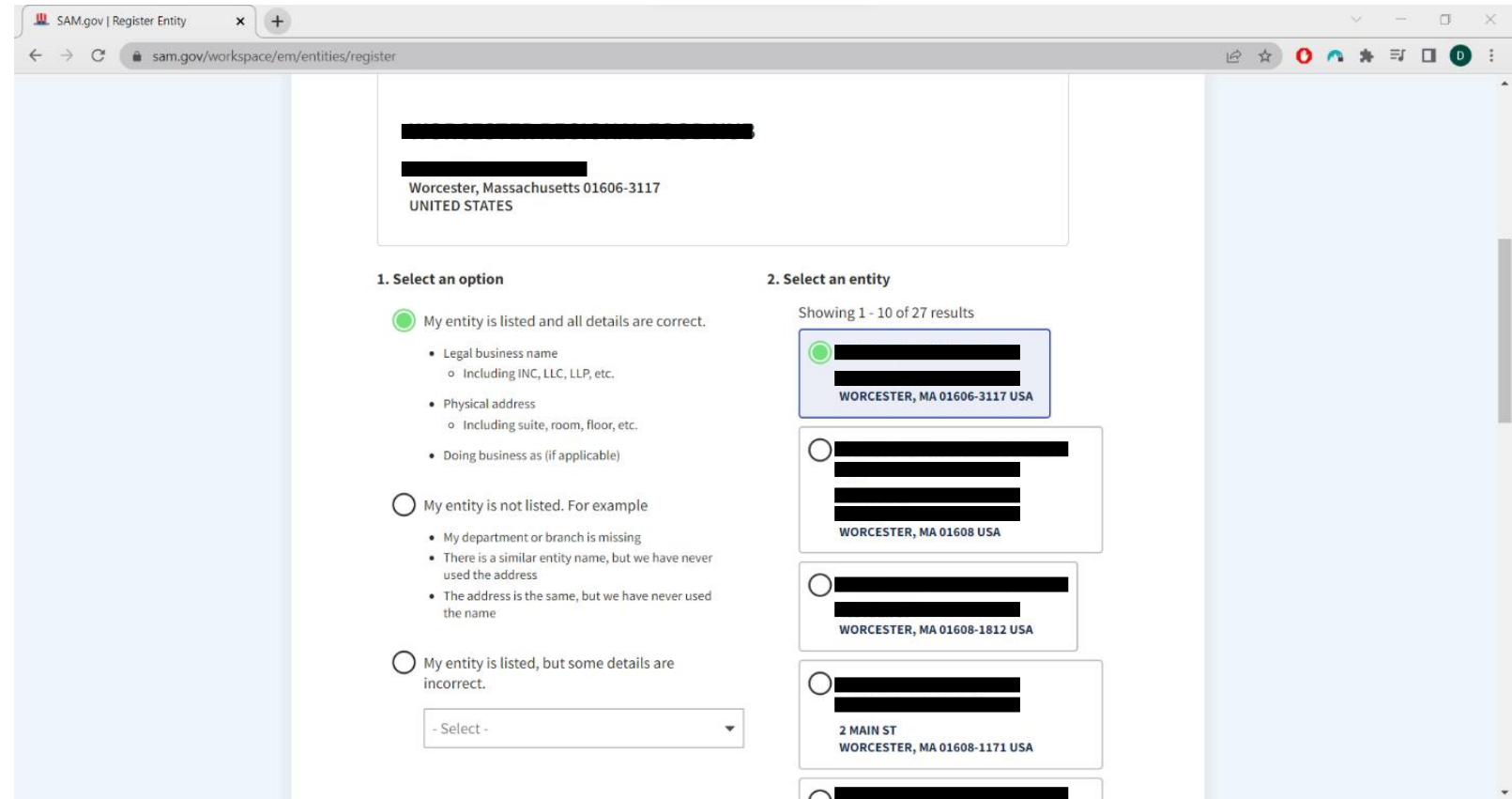
The screenshot shows a web browser window with the URL `sam.gov/workspace/em/entities/register`. The page title is "Enter Entity Information". Below the title, a note states: "All the following information will be used to validate your entity, unless marked as optional." The form contains several sections:

- Legal Business Name**: A text input field with a note: "If you are acting on behalf of a limited partnership, LLC, or corporation, your legal business name is the name you registered with your state filing office."
- Physical Address**: A text input field with a note: "Your physical address is the street address of the primary office or other building where your entity is located. A post office box may not be used as your physical address."
- Country**: A dropdown menu with a blue arrow icon.
- Street Address 1**: A text input field with a blue arrow icon.
- Street Address 2 (Optional)**: A text input field.
- ZIP Code (+4)**: A text input field with a blue arrow icon.
- City** and **State**: Two text input fields.

# 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.



The screenshot shows the SAM.gov Register Entity page. At the top, there is a search bar with a redacted address: "Worcester, Massachusetts 01606-3117 UNITED STATES". Below the search bar, there are two main sections: "1. Select an option" and "2. Select an entity".

**1. Select an option**

- ☒ My entity is listed and all details are correct.
  - Legal business name
    - Including INC, LLC, LLP, etc.
  - Physical address
    - Including suite, room, floor, etc.
  - Doing business as (if applicable)
- ☐ My entity is not listed. For example
  - My department or branch is missing
  - There is a similar entity name, but we have never used the address
  - The address is the same, but we have never used the name
- ☐ My entity is listed, but some details are incorrect.
 

- Select -

**2. Select an entity**

Showing 1 - 10 of 27 results

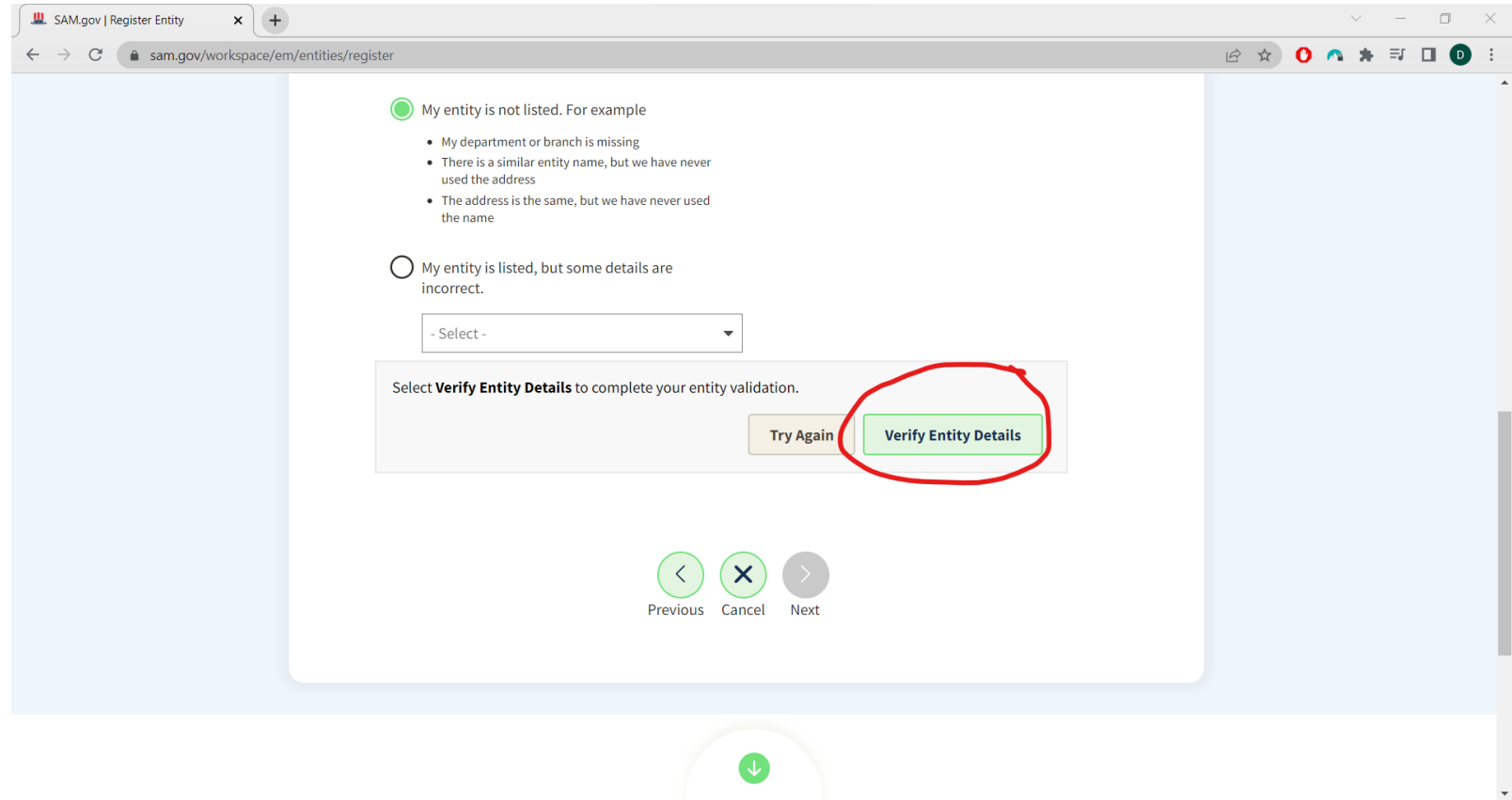
- ☒ [Redacted] WORCESTER, MA 01606-3117 USA
- ☐ [Redacted] WORCESTER, MA 01608 USA
- ☐ [Redacted] WORCESTER, MA 01608-1812 USA
- ☐ [Redacted] 2 MAIN ST WORCESTER, MA 01608-1171 USA
- ☐ [Redacted]

## 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.





The screenshot shows the SAM.gov Register Entity page. The browser address bar displays "sam.gov/workspace/em/entities/register". The page contains two radio button options for entity status. The first option, "My entity is not listed. For example", is selected and includes a bulleted list of reasons: "My department or branch is missing", "There is a similar entity name, but we have never used the address", and "The address is the same, but we have never used the name". The second option is "My entity is listed, but some details are incorrect.", followed by a dropdown menu currently showing "- Select -". Below these options, a text prompt reads "Select **Verify Entity Details** to complete your entity validation." Two buttons are present: "Try Again" and "Verify Entity Details". The "Verify Entity Details" button is highlighted with a red circle. At the bottom of the form, there are three circular navigation buttons: "Previous" (with a left arrow), "Cancel" (with an X), and "Next" (with a right arrow). A large green arrow icon is visible at the very bottom of the page.



# Verifying Your Organization

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

Entity Type	 Attach These <b>Acceptable</b> Documents (examples)	 Unacceptable Documents - <b>Do Not Attach</b>
<b>All Entities</b>	<ul style="list-style-type: none"> <li>• Certified copies of the following: <ul style="list-style-type: none"> <li>• Share certificates</li> <li>• Articles of organization/incorporation</li> <li>• Tax returns/filings*</li> <li>• Certificate of formation</li> <li>• Articles of formation</li> <li>• Certificate of organization</li> </ul> </li> <li>• Utility bills</li> <li>• Bank statements*</li> <li>• “Doing business as” documentation</li> <li>• Stock ownership</li> <li>• Employer Identification Number documentation from IRS</li> <li>• Tax ID confirmation documents from IRS</li> <li>• Company bylaws</li> <li>• Operating agreements</li> <li>• Non-expired driver’s license (does not need to be a REAL ID)—sole proprietors and individuals doing-business-as only</li> </ul>	<ul style="list-style-type: none"> <li>• Applications you submitted without evidence of receipt or approval from an authority</li> <li>• Your own documents that have not been stamped or verified by an authority</li> <li>• Screenshots from SAM.gov, dla.CAGE.mil, or any other government system that stores your name and address</li> <li>• Federal contract or grant award documents</li> <li>• DUNS profiles</li> <li>• Notarized entity administrator letters</li> <li>• IRS form W-9 (request for Taxpayer Identification Number) and IRS form SS4 (application for an Employer Identification Number)</li> <li>• Leases</li> <li>• Passports, unless they include the current physical address</li> </ul>

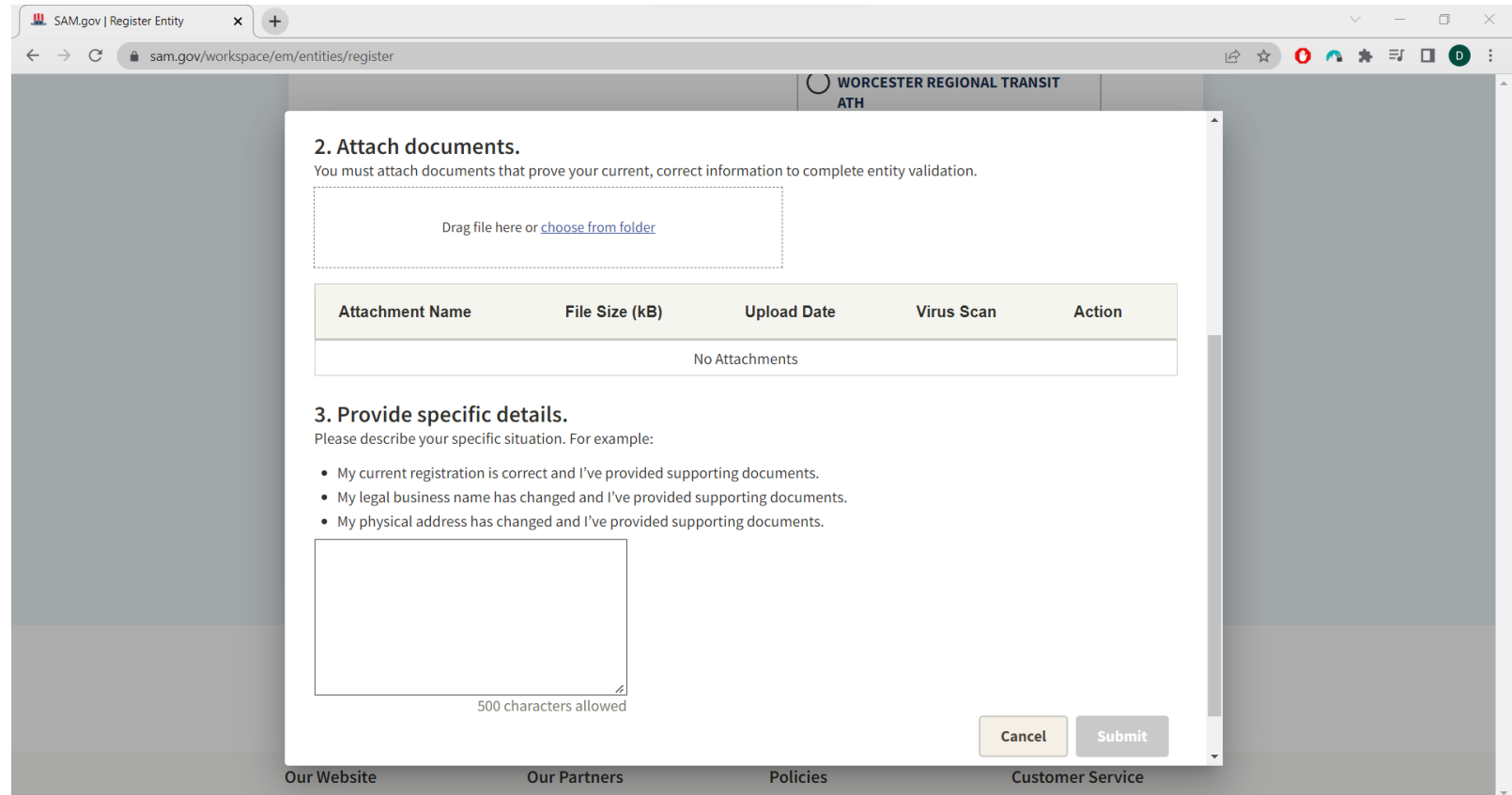
**This is a list of examples.** We accept documentation from state or federal verifiers (or a city/county in rare cases of at-home businesses that would involve an address validation), or a utility that requires a credit verification. We do not accept documentation that does not have proof that it was 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.



The screenshot shows the SAM.gov Register Entity form. The browser address bar displays 'sam.gov/workspace/em/entities/register'. The form is titled '2. Attach documents.' and includes a sub-instruction: 'You must attach documents that prove your current, correct information to complete entity validation.' Below this is a dashed box for file upload with the text 'Drag file here or [choose from folder](#)'. A table with the following columns is shown: Attachment Name, File Size (kB), Upload Date, Virus Scan, and Action. The table currently contains the text 'No Attachments'. Below the table is section '3. Provide specific details.' with the instruction 'Please describe your specific situation. For example:'. A bulleted list provides examples: 'My current registration is correct and I've provided supporting documents.', 'My legal business name has changed and I've provided supporting documents.', and 'My physical address has changed and I've provided supporting documents.'. A text input box is provided for the user's response, with a note '500 characters allowed' at the bottom right. At the bottom of the form are 'Cancel' and 'Submit' buttons. The footer of the page includes links for 'Our Website', 'Our Partners', 'Policies', and 'Customer Service'.

Attachment Name	File Size (kB)	Upload Date	Virus Scan	Action
No Attachments				

- My current registration is correct and I've provided supporting documents.
- My legal business name has changed and I've provided supporting documents.
- My physical address has changed and I've provided supporting documents.

500 characters allowed

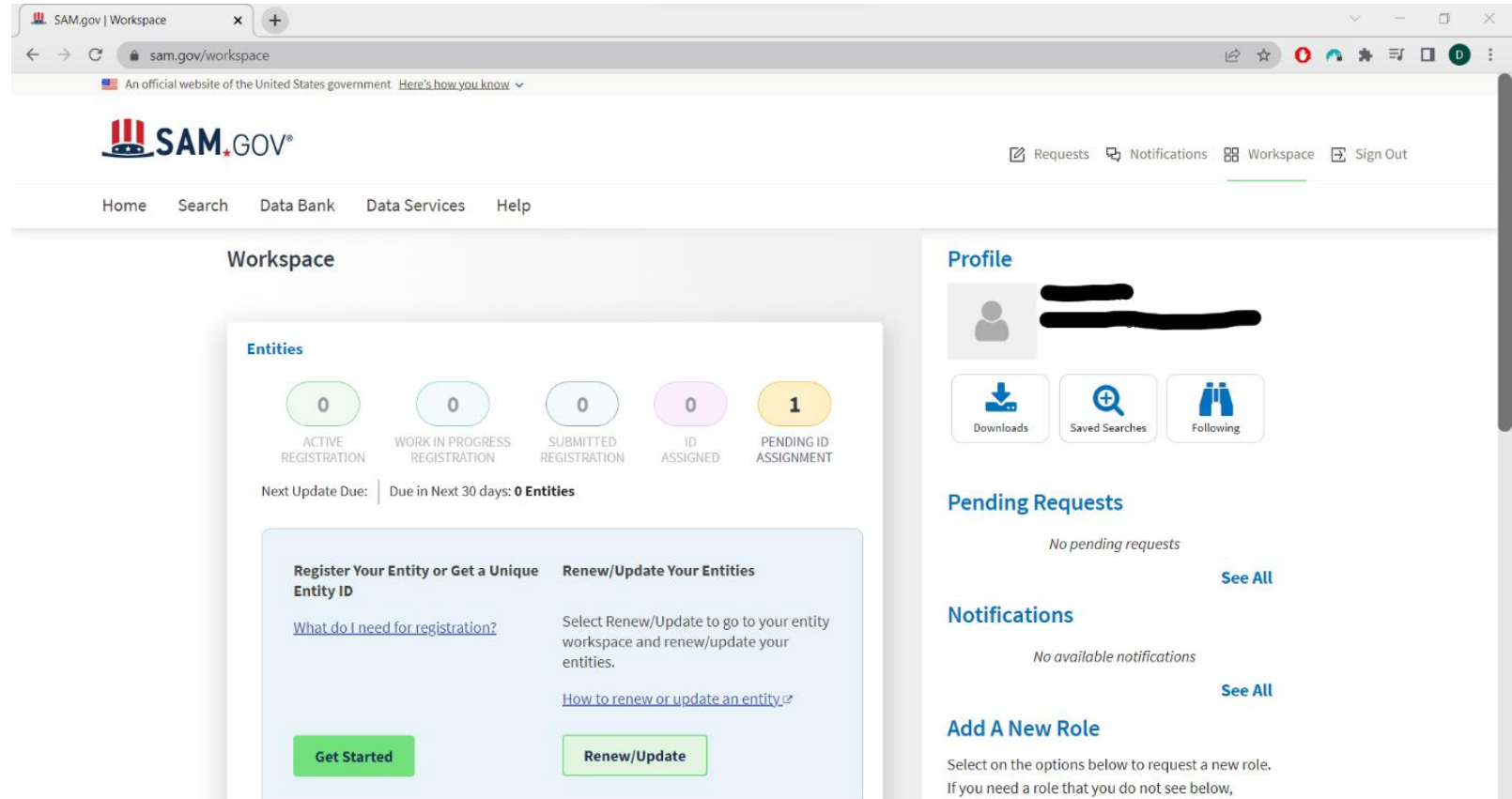
Cancel Submit

Our Website Our Partners Policies Customer Service

# 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:

- The **date of incorporation** for your entity.
- Your **Employer Identification Number (EIN)** in an IRS document or your Social Security Number if you do not have an EIN.
- Your entity's **bank account information**.
- 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**.

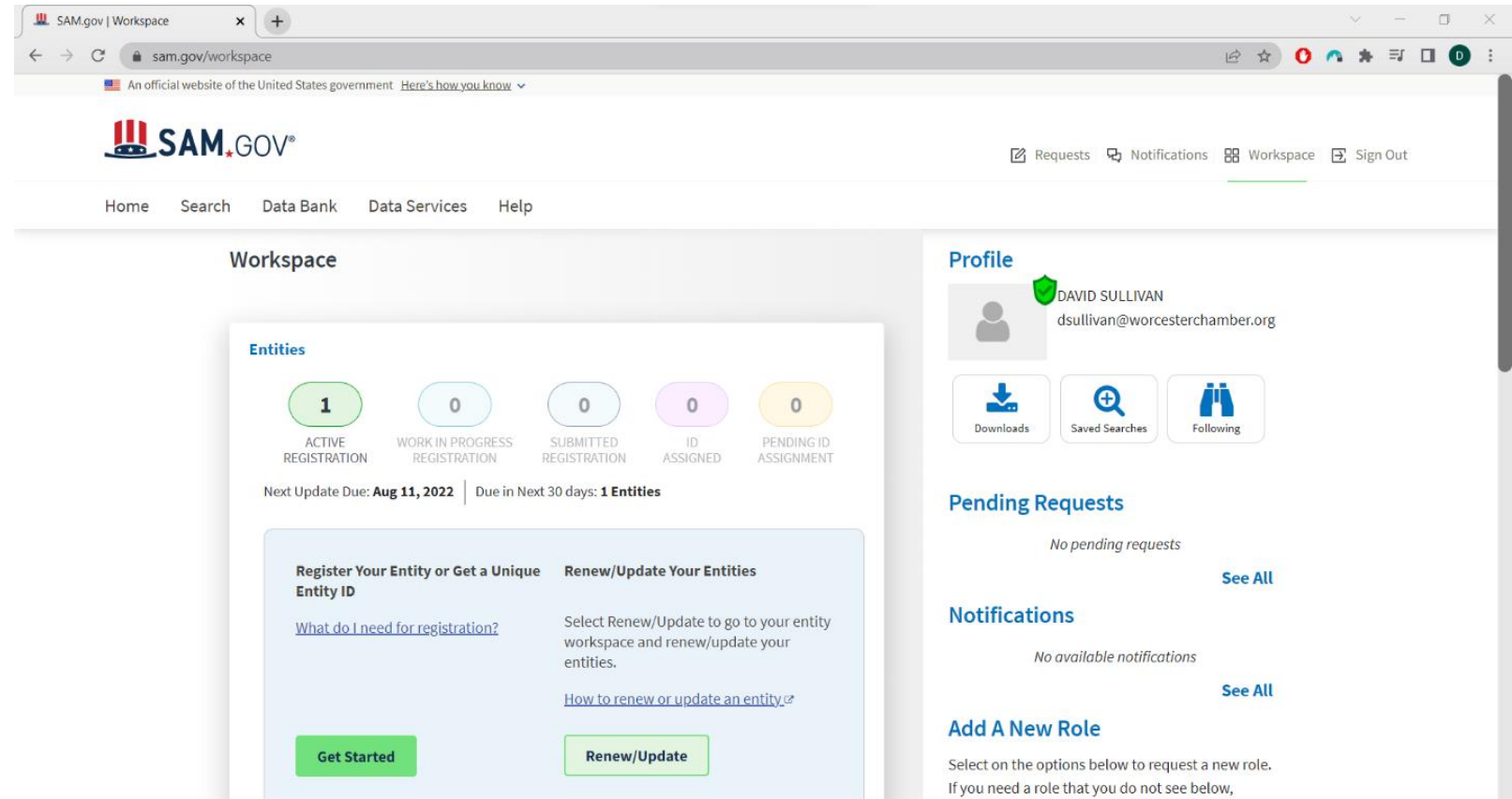


The screenshot shows the SAM.gov Workspace page. The browser address bar displays 'sam.gov/workspace'. The page header includes the SAM.GOV logo and navigation links: Home, Search, Data Bank, Data Services, Help. The main content area is titled 'Workspace' and features a 'Entities' section with five status bubbles: ACTIVE REGISTRATION (0), WORK IN PROGRESS REGISTRATION (0), SUBMITTED REGISTRATION (0), ID ASSIGNED (0), and PENDING ID ASSIGNMENT (1). Below these bubbles, it states 'Next Update Due: Due in Next 30 days: 0 Entities'. The 'Entities' section is divided into two columns: 'Register Your Entity or Get a Unique Entity ID' with a link 'What do I need for registration?' and a 'Get Started' button; and 'Renew/Update Your Entities' with instructions to select 'Renew/Update' to go to the entity workspace and renew/update entities, a link 'How to renew or update an entity', and a 'Renew/Update' button. On the right side, there is a 'Profile' section with a user icon and name, and three buttons: Downloads, Saved Searches, and Following. Below the profile are sections for 'Pending Requests' (No pending requests, See All), 'Notifications' (No available notifications, See All), and 'Add A New Role' (Select on the options below to request a new role. If you need a role that you do not see below,).

## 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.



The screenshot shows the SAM.gov Workspace interface. At the top, the SAM.gov logo is displayed. The main navigation bar includes links for Home, Search, Data Bank, Data Services, and Help. The Workspace section is active, showing a summary of entity registration status. The status is broken down into five categories: Active Registration (1), Work in Progress Registration (0), Submitted Registration (0), ID Assigned (0), and Pending ID Assignment (0). Below this, a message indicates the next update due on August 11, 2022, and that there is 1 entity due in the next 30 days. Two main action buttons are visible: 'Get Started' for registering a new entity and 'Renew/Update' for existing entities. The right sidebar shows the user profile for David Sullivan, with links for Downloads, Saved Searches, and Following. Below the profile, there are sections for Pending Requests (none shown) and Notifications (none available).

# 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](mailto: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.