

Washington PTAC Presentation to Mission Support Alliance

August 14, 2013





- Today's Agenda

- WA PTAC Program
- Collaboration Opportunities
- SAM Training
- Excluded Parties List System (EPLS)
- General Q & A

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SAM Training

Excluded Parties List

General Q&A

- Washington PTAC Program
 - Started in Washington in the late 1980's at Snohomish Economic Development Council (now Economic Alliance Snohomish County)
 - Moved to Thurston Economic Development Council in 2012
 - Mission is to **increase the number of Washington based firms that are successful** in winning federal, state and local government contracts

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• Washington PTAC Program

- This is done through one-on-one technical assistance on:
 - Registrations
 - Certifications
 - Market Research Techniques
 - Bidding Assistance
 - Match-Making
 - Understanding Regulations
 - Electronic Bid Match - \$135/year
- PTAC helps large businesses
 - Find qualified suppliers for SB plans
 - Registrations, Certifications, FAR compliance, etc. for their subs

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General Q&A



- Washington PTAC



Washington PTAC

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- How MSA & PTAC Collaborate Now:

- Cross promotion & referrals
- Assistance with locating vendors
- Facilitating outreach events
- Other?

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General Q&A

- Collaboration in the Future?
 - Continuation of good things
 - Co-Sponsored Events
 - Understand each others strengths and limitations
 - What is a good referral to who?
 - What would be helpful to you?

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➤ System for Award
Management - SAM



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*** Indicates systems currently in SAM**

SAM - Top 10 Things We Tell Businesses



1. Registration is FREE at www.sam.gov. Googling "SAM" leads to sites that charge for assistance.

2. Use Mozilla Firefox or Google Chrome (NOT IE)!

3. If you had an active record in CCR, you have an active record in SAM. To update or renew your records in SAM, follow the prompts to migrate your legacy profile. If your registration is expired/inactive, you must contact the Federal Service Desk.

4. Your business is referred to as an "entity" by SAM.

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5. A DUNS number is required to register. Update any necessary information on file with Dun & Bradstreet at least 24 hours prior to registering or updating information in SAM.

6. A Tax Identification Number (TIN or EIN) is required to register.

7. Contact the Federal Service Desk before starting migration if your old registration is inactive or after completing migration if you no longer have access to the email account tied to your old CCR account.

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8. To submit your registration, you must review and save the entire SAM record in one sitting. Don't hit the browser's "back" button.

9. Due to IRS and CAGE validation, It will take 3-5 business days for your registration to become active after submittal. Plan ahead!

10. Once your registration is active, you will likely be contacted by vendors attempting to sell you their services related to government contracting (consultants, etc.). Many are unnecessary and some may be scams. In many cases, the services you would be paying for are available at no cost by your PTAC.

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General Q&A

Common Issues

- Unable to locate legacy profile
- No longer have access to CCR email account
- DUNS information is incorrect
- Unable to select/change NAICS
- Unable to submit registration
- Option to self-certify as EDWOSB not available
- Small Disadvantaged Business Error
- Need to change banking information

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Common Issues

- Point of Contact page errors
- Understanding Reps and Certs
- Dynamic Small Business Search
- Notification of TIN Validation Error

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What Happens After Submittal?

- Within 3-5 business days, you should receive 2 emails from samadmin@sam.gov notifying that:
 1. TIN has been validated by the IRS
 2. Registration is active. Contains CAGE code.
If you do not receive these emails, see instructions in guide to check status.
- If you receive emails indicating that your TIN or CAGE code could not be validated, follow the instructions in the emails and contact PTAC if additional assistance is needed.
- SAM registration is valid for one year, at which time you will need to update your information.

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Important Contact Info

Federal Service Desk

www.fsd.gov (866) 606-8220

Search FAQs first. Create account and submit a help desk ticket. (faster than calling)

Dun and Bradstreet

www.fedgov.dnb.com/webform

Request a DUNS number, make changes to info on file

IRS

(866) 255-0654 www.irs.gov

Website to request Employer Identification Number, phone number to handle TIN Validation Issues.

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Important Contact Info cont.

Tri-Cities PTAC Office

(509) 736-0510 or

ashley.coronado@tricityregionalchamber.com

- SAM Guide
- Technical Support
- In-person assistance where necessary/possible
- Direct Tier II Federal Service Desk Assistance, particularly in instances where a contract is being awarded or payment is due.

Encourage firms to contact WA PTAC for help with

SAM!



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Excluded Parties List

General Q&A

EPLS

➤ Excluded Parties list



What is an Exclusion?

Exclusion records identify those parties excluded from receiving federal contracts, certain subcontracts, and from certain types of federal financial and non-financial assistance and benefits. These are also commonly known as “suspensions” and “debarments”.

The suspension and debarment data previously housed on EPLS.gov is now found on www.sam.gov.

Do you need access to exclusion functionality? See the guide on the help page of www.sam.gov.

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**Excluded
Parties List**

General Q&A

Terminology Changes



Legacy EPLS Term	New SAM Term
Cause	Nature (Cause)
Treatment	Effect
CT Action	[DISCONTINUED]
Action Date	Active Date
Archived	Inactive
Entity	Special Entity Designation
Permanent	[DISCONTINUED]
CT Code	Exclusion Type
Exclusion Type	Exclusion Program
Description	Additional Comments

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**Excluded
Parties List**

General Q&A

Excluded Parties List - Entity

1. On the search records tab in SAM, type the Entity's name, DUNS number, or CAGE code in the search bar and click on the Search icon.
2. If no exclusion record is found for the entity, the entity does not have an active exclusion submitted in SAM by a federal agency.
3. If an exclusion record is found, it will display in a box marked **"Exclusion"** in purple; check the status in the top-right corner of the box. If the status indicates "Active", there is an active exclusion for that entity.

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General Q&A

Entity	AL HUDA CONTRACTING COMPANY LLC	Status: Active
DUNS: 366458573	+4:	CAGE Code:
Has Active Exclusion?: No	DoDAAC:	View Details

Exclusion	Al-Methwad Company	Status: Active
DUNS: U00000431	+4:	CAGE Code:
Classification: Firm		View Details

Excluded Parties List - Individual

1. Go to the "Search Records" Page of SAM
2. Enter a search term in the box and click search
3. Click on the Performance Information check box in the Filter panel on the left side of the screen
4. Click on Entity Information
5. Click on Individual Name
6. Click on First Name and enter the entity's first name in the box provided
7. Click on Last Name and enter the entity's last name in the box provided
8. Click on SSN and enter the entity's SSN
9. Click on Apply Filters

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General Q&A

Searching for Multiple Names

1. After entering the first entity name or individual name, click on the plus symbol and enter another name in the box provided. Do this for all fields where multiple name searches are desired
2. Based on these filters, SAM will search performance information records for match on any combination of the search terms you entered. For example if you entered the first names Donna and Leroy and the last names Smith and Johnson, you may get listings for "Donna Smith," "Donna M. Smith," "Donna Johnson," "Leroy Johnson," "Leroy Smith," etc.

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General Q&A

➤ Questions, Comments, Discussion?

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