

Registrations for Competitive Funding

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REGISTRATION 1: SAM.GOV AND UEI

The first registration that you will need to complete is a **SAM.gov registration**, which will also provide your entity with a **Unique Entity ID**. Both are necessary to do business with the federal government. SAM.gov Registration includes two key components:

- 1. Entity Validation** confirms an entity's existence, location, and uniqueness. Uniqueness is based on being a separate legal entity with a separate physical address. After your entity is deemed valid, Sam.gov assigns a Unique Entity ID. This is a 12-character alphanumeric identifier used in SAM.gov and other federal government systems to identify your organization.
- 2. Entity Registration** is necessary to apply for federal government contracts and assistance. *This registration must be renewed every 365 days to remain active.*

SAM.gov states that it can take up to 10 days for completed registrations to become active. Note- this may change depending on the volume of requests that SAM.gov is fielding at any one time. It is a good idea to begin this process well before any funding deadlines you are interested in.

Part 1: Obtaining a Unique Entity Identifier (UEI)

Required Information for Obtaining a UEI

NOTE: The person who completes this registration process must be authorized to conduct transactions for the entity.

- 1. Legal Business Name**
 - The official name of your business, as registered with the appropriate government authority.
- 2. Physical Address**
 - A valid street address (no P.O. Boxes). This should be the physical location of your business.
- 3. Date and State of Incorporation**
 - The date your business was legally established.
 - The state or country where your business is incorporated.
- 4. National Provider Identifier (NPI)**
 - This is required for non-U.S. entities.

Step-by-Step Process for Obtaining a UEI

- 1. Prepare Information:**
 - Ensure you have the legal business name, physical address, date and state of incorporation, and NPI ready (if applicable).
- 2. Access SAM.gov:**

- Go to the SAM.gov website.
- On the home page, select "Sign In" at the upper right corner
- On the next screen, select "Accept" to agree to the US Government System terms, and you will be redirected to login.gov.
- Once you are signed into Login.gov, you will be redirected to your SAM.gov Workspace.

3. Register for a New Entity:

- Navigate to the "Get Started" or "Register Your Entity" section.
- Select the option "Get a Unique Entity ID."
- Select an option under "What do you want to do?" There are 3 options.
 - Financial Assistance Awards registration: This only allows your entity to apply for grants and loans and requires less information.
 - All Awards registration: allows your entity to bid on contracts and other procurements AND apply for financial assistance (grants and loans). This option requires more information.
 - The third option, "Get a Unique Entity ID only," is NOT an entity registration and will not satisfy the requirements to compete for competitive federal funding. This option only validates an entity's legal business name and physical address.

4. Provide Entity Information:

- Enter your Entity Name exactly as it appears on your legal documents.
- Enter the Physical Address (no P.O. Boxes). Ensure this address matches your official business address.
- Enter the Date and State of Incorporation.

5. Validation Process:

- SAM.gov will attempt to validate your entity name and address.
- If the validation is successful, you will be assigned a UEI.
- If validation fails, you will receive instructions to correct the information or create a help ticket with the Federal Service Desk.

6. Confirmation:

- Once validated, confirm your registration details.
- Receive your Unique Entity ID (UEI) and use it for future registrations and applications on SAM.gov.

Part 2: SAM.gov Registration

Required Information for SAM.gov Registration

1. Core Data

- Organization start date
- Fiscal year-end date
- Division name and number (optional)
- Website URL (optional)
- Marketing Partner Identification Number (MPIN)

- Physical address
 - Mailing address
 - Taxpayer Identification Number (TIN) for U.S. entities
 - IRS Consent Form (for U.S. entities)
 - CAGE/NCAGE Code
- 2. Ownership and Predecessor Details**
- Ownership information
 - Immediate owner's NCAGE Code (if applicable)
 - Predecessor details (if applicable)
- 3. General Information**
- Country and state of incorporation
 - Security clearance details
 - Institution type
 - Disadvantaged business enterprise status
 - Native American entity type (if applicable)
 - Organizational and profit structure
 - Socioeconomic categories
- 4. Financial Information**
- Credit card acceptance
 - Electronic funds transfer details (optional for non-U.S. entities)
 - Executive compensation questions (if applicable)
 - Proceedings questions (if applicable)
- 5. Assertions**
- Goods and services information
 - Size metrics
 - Business locations
 - EDI information (if applicable)
 - Disaster response information
- 6. Representations and Certifications**
- Federal Acquisition Regulation (FAR) responses
 - Business operations
 - Tax information
 - Debarment status
 - Compliance with various federal requirements

Step-by-Step Process for SAM.gov Registration

1. Login to SAM.gov

- Access SAM.gov and log in using your credentials.

2. Enter Core Data

- Fill in the organization start date, fiscal year-end date, division name and number (if applicable), and website URL.

- Create an MPIN.
- Verify and update the physical and mailing addresses.
- Enter your TIN (for U.S. entities) and complete the IRS Consent Form.

3. Obtain/Enter CAGE or NCAGE Code

- If you don't have a CAGE Code (for U.S. entities), it will be assigned automatically.
- Non-U.S. entities should request an NCAGE Code before starting the registration.

4. Provide Ownership and Predecessor Details

- Indicate if your entity is owned or controlled by another entity.
- Provide the immediate owner's NCAGE Code if applicable.
- List predecessors if your entity is a successor to a predecessor entity with federal contracts or grants in the last three years.

5. Complete General Information

- Enter country and state of incorporation.
- Provide security clearance details, institution type, and disadvantaged business enterprise status.
- Specify Native American entity type, organizational and profit structure, and socioeconomic categories.

6. Enter Financial Information

- Indicate if you accept credit cards.
- Provide electronic funds transfer details (optional for non-U.S. entities).
- Answer executive compensation and proceedings questions (if applicable).

7. Provide Assertions

- Enter information about goods and services provided by your entity.
- Fill in size metrics, business locations, and EDI information (if applicable).
- Detail your disaster response capabilities.

8. Complete Representations and Certifications

- Respond to Federal Acquisition Regulation (FAR) questions about business operations, tax information, debarment status, and compliance with federal requirements.

9. Review and Submit

- Carefully review all entered information for accuracy and completeness.
- Submit your registration.

10. Follow Up

- Monitor the status of your registration and respond to any requests for additional information promptly.
- Keep your registration information up to date annually or as changes occur.

REGISTRATION 2: GRANTS.GOV

Requirements for Grants.Gov Registration

- Email** (same as used in SAM.gov for E-Business Points of Contact)
- Phone Number**
- Organization Name**

Step-by-Step Process for Grants.Gov Registration

1. Create a Grants.gov Account

- Visit the Grants.gov registration page and click the "Get Registered Now" button.

2. Create a Login.gov Account:

- If you don't have a Login.gov account, create one.
- [Login.gov](#) is a secure sign-in service the public uses to sign in to participating government agencies. Participating agencies will ask you to create a Login.gov account to securely access your information on their website or application.

3. Link Grants.gov Account with Login.gov

- After creating a Login.gov account, link it to your Grants.gov account using your chosen username and password.

4. Add a Profile to Grants.gov

- Use the UEI obtained from SAM.gov to complete your profile on Grants.gov.

5. Delegate Administrative Roles

- The EBiz POC should assign administrative roles to other users within Grants.gov as needed.

Assigning Roles in Grants.gov

Types of roles in Grants.gov

1. **Core Roles:** includes 1) Expanded AOR, 2) Standard AOR, and 3) Workspace Manager.
2. **Custom Roles:** Organizations can create as many or as few of these roles as needed. They may be given a unique name and assigned a custom set of privileges.

<i>Pros of Using Custom Roles</i>	<i>Cons of Using Custom Roles</i>
<ul style="list-style-type: none">• Set privileges in the unique way to align with your organization's grant workflow• Create role names to fit the titles and processes you use	<ul style="list-style-type: none">• Need to develop internal training resources for unique set of functionalities• Limited applicant user support

How to Manage Roles in Grants.gov

Once your organization and the individuals responsible for compiling, uploading, and submitting applications have registered in grants.gov, you must assign roles to these individuals to access key functions for submission in the application portal.

1. To access the Manage Organization Roles Page in Grants.gov, you must have a role assigned that allows role management privileges. These roles include:
 - Electronic Business Point of Contact (EBiz POC);
 - Expanded Authorized Organization Representative (AOR); and
 - Custom Role with the requisite privileges.
2. Under the Roles tab, roles can be created, modified, deleted, and viewed.
3. Click the Activate or Inactivate links in the Availability column to toggle the available core roles.

Definitions of Role Privileges

Basic Workspace Privileges

The Workspace Manager core role has the following privileges (as do the AOR core roles listed below):

- **Create Workspace:** Ability to create a workspace, which may be performed from the View Grant Opportunity page, Apply Now link, or Copy action from the Manage Workspace page.
- **Own Workspace:** Ability to be a workspace owner, which allows users to add participants to a workspace and control form-level access (among other things). Workspace ownership can be transferred to other participants with this privilege.

Standard Privileges

The Standard AOR core role has the following privileges:

- **View Organization:** Ability to view but not edit information about the organization, such as SAM information, roles, and organization preferences in Grants.gov.
- **Manage Applicants - Basic Workspace Roles:** Ability to assign the Workspace Manager role (or a custom role with only basic workspace privileges) to an organization's users.
- **Manage Participants for My Workspaces:** Ability to add or remove participants from workspaces of which the user is a participant.
- **Submit Applications for My Workspaces:** Ability to submit applications for workspaces in which the user is a participant and to check the status of these submissions.

Expanded Privileges

The Expanded AOR core role has the following privileges:

- **Manage Organization:** Ability to change organization-level settings and create and edit organization custom roles.
- **Manage Applicants - All Roles:** Ability to assign and revoke organizational user roles.

- **Manage Certificates:** Ability to view or change roles on system-to-system (S2S) certificates. This only applies to organizations using S2S to connect to Grants.gov.
- **Manage Participants for Organization Workspaces:** Ability to manage participants within all organization workspaces without being a participant of the workspace(s). Refer to the Forms Tab help article to review allowable activities.
- **Participant Activities for Organization Workspaces:** Ability to perform participant activities within all organization workspaces without being a participant of the workspace(s).
- **Submit Applications for Organization Workspaces:** Ability to submit applications within all organization workspaces without being a participant of the workspace(s).
- **Check Application Status for Organization:** Ability to check the application status for all organization submissions.

ADDITIONAL REGISTRATIONS: APPLICATION PORTALS

Below is an overview of other application portals (linked) you may encounter while pursuing federal funding. Each portal has a unique registration process:

- **eBRAP** – A Department of Defense website (Electronic Biomedical Research Application Portal) to support the submission of Biomedical Research Applications through the DOD.
- **EDA – EDGE Portal** – The Economic Development Agency has a new submission portal hosted on its own website. Grants are no longer submitted through the Grants.gov portal.
- **EERE Exchange/OCED Exchange** – Two Department of Energy Grant Portals for different areas of DOE Funding. Both websites host information on funding opportunities and portals for submission.
- **ERA Commons** – A registration/portal required by the National Institutes of Health.
- **FedConnect** – Required after awards are made but also sometimes used to communicate information on federal contracts or FAQ responses.
- **FEMA GO** – An application website for the Federal Emergency Management Agency
- **JustGrants** – A Department of Justice Website that hosts funding opportunities AND the portal for submission of various DOJ funding opportunities.
- **ND Grants** – Another FEMA website that covers Non-Disaster Grants
- **RD Apply** – A USDA Rural Development submission portal.
- **SAMHSA – ERA ASSIST** - The Substance Abuse and Mental Health Services Administration requires multiple registrations to submit their grants. The link below walks you through the process.
- **Small Business Administration** – Some funding opportunities require the entity to register through the Small Business Administration.
- **Valid Eval** – Certain DOT grants such as the Safe Streets and Roads for All (SS4A), Strengthening Mobility and Revolutionizing Transportation (SMART), and Reconnecting Communities Pilot Grant Programs.