



Welcome to the Partners in Excellence Workshop

UNCLASSIFIED

This document has been reviewed by a CNS Dual
Authority DC/RO and confirmed to be UNCLASSIFIED.
Name: Steven Aragon
Date: 09/28/2022
CNS eDC/RO ID: 500108

Reminders for Our Amarillo and Oak Ridge Participants

- No food or drink
- Please silence your phones and other electronic devices
- Exit doors
- Restrooms
- CNS as well as Small Business Development Center and Procurement Technical Assistance Center representatives are in attendance to answer your questions

Reminders for Our WebEx Participants

- You are muted and cannot unmute yourself.
- If you need assistance, please send a message to the Host via Chat.
- If your audio is not functioning, please call in using the information below.
- Keep these numbers accessible in case you loose connection.

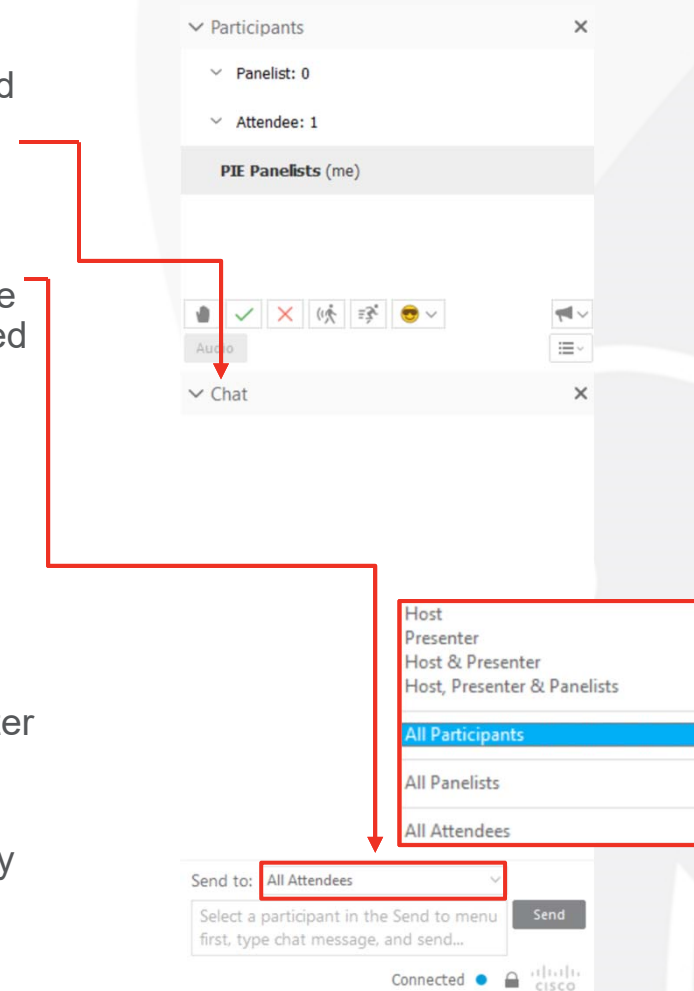
Phone Number: US Toll +1(415) 527-5035

Session Number: 2763 559 1459

Session Password: YJmV4t6mQ7H (95684866 from phones)

Chat Functions Within WebEx

- Under the Participants list, there will be a Chat menu (may be collapsed at the bottom—if so select “Chat” and the menu should be revealed)
- Selecting the “To” button within the Chat menu will designate who will receive your message
 - **To all Participants:** Everyone in the meeting will be able to view your chat message (Should not be used unless directed to)
 - **To all Panelists:** Only all Panelists will be able to view your chat message
 - **To Host:** Your message will only be visible to the Host
 - **To Presenter:** Only the individual currently presenting will be able to view your chat message
 - **To Host and Presenter:** The Host and the Presenter will be able to view your message
 - **Selecting Individuals Name:** Selecting an individual’s name will make your chat message only visible to the individual that you have selected
- **Note:** During our Q&A Session, questions should be sent to all Panelists. **If questions are sent to another individual or group in the Chat menu, they may not be seen.**



Safety is Our Top Priority

Safety Message: September is National Preparedness Month

- **Businesses and their staff face a variety of hazards:**
 - Natural hazards
 - Health hazards
 - Human-caused hazards
 - Technology-related hazards
- **Be Ready:**
 - Identify Your Risk
 - Develop A Plan
 - Take Action
 - Be Recognized and Inspire Others



Photo Source: <https://www.ready.gov>

Resource: <https://www.ready.gov>

Agenda

<i>Time EDT</i>	<i>Time CDT</i>	<i>Agenda Item</i>	<i>Speaker</i>
2 p.m.	1 p.m.	Welcome	Greta Ownby, Y-12 Small Business Program Manager
2:05 p.m.	1:05 p.m.	Opening Comments	Amy Wilson, Y-12 Deputy Site Manager Kenny Steward, Pantex Deputy Site Manager
2:15 p.m.	1:15 p.m.	CNS Construction & Design Opportunities	Robert (Bob) Noto, Senior Manager Security & Excess Facilities Disposition Projects (EFDP)
2:35 p.m.	1:35 p.m.	CNS Procurement Forecast	Rick Hillert, Director CNS Procurement Operations
2:55 p.m.	1:55 p.m.	Featured Construction Project Y-12 Firehouse – Geiger Brothers	Scott Massie, Chief Executive Officer Terry Spencer, Vice President – Operations East TN Geiger Brothers
3:25 p.m.	2:25 p.m.	Subcontract Technical Representative (STR) Program	Mike Mulligan, CNS STR Program Lead
3:35 p.m.	2:35 p.m.	PTAC Services & Sam.gov Update	Jutta Bangs, Procurement Counselor Procurement Technical Assistance Center
3:50 p.m.	2:50 p.m.	Closing Remarks	Jason Eaton, Senior Director CNS Supply Chain Management



Opening Comments

Amy Wilson

Amy.Wilson@pxy12.doe.gov

Y-12 National Security Complex
Deputy Site Manager





Opening Comments

Kenny Steward

Kenny.Steward@pxy12.doe.gov

Pantex Deputy Site Manager





CNS Construction and Design Opportunities

Robert (Bob) Noto

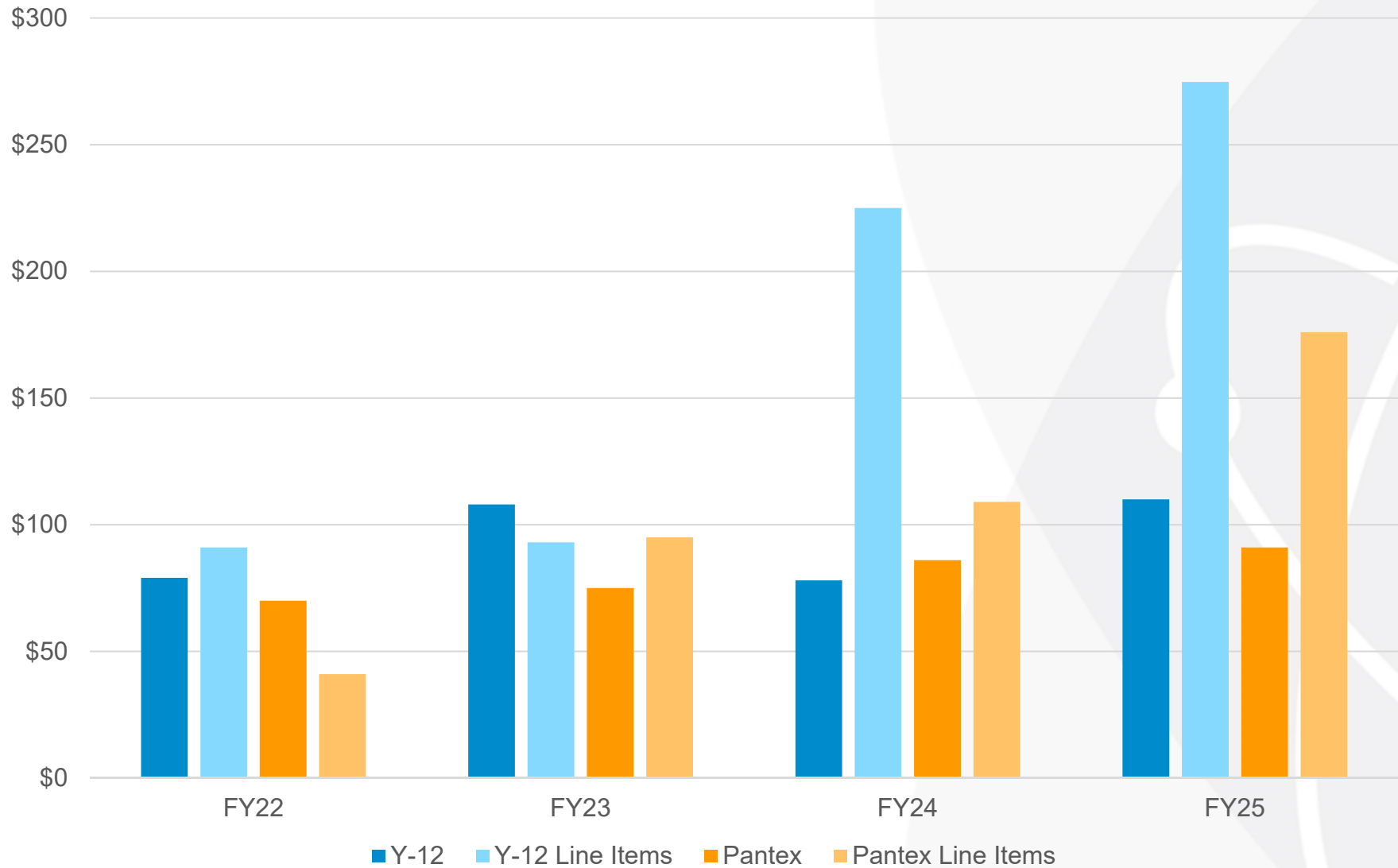
[@pxy12.doe.gov](mailto:pxy12.doe.gov)

Senior Manager, Security & Excess Facilities
Disposition Projects (EFDP)



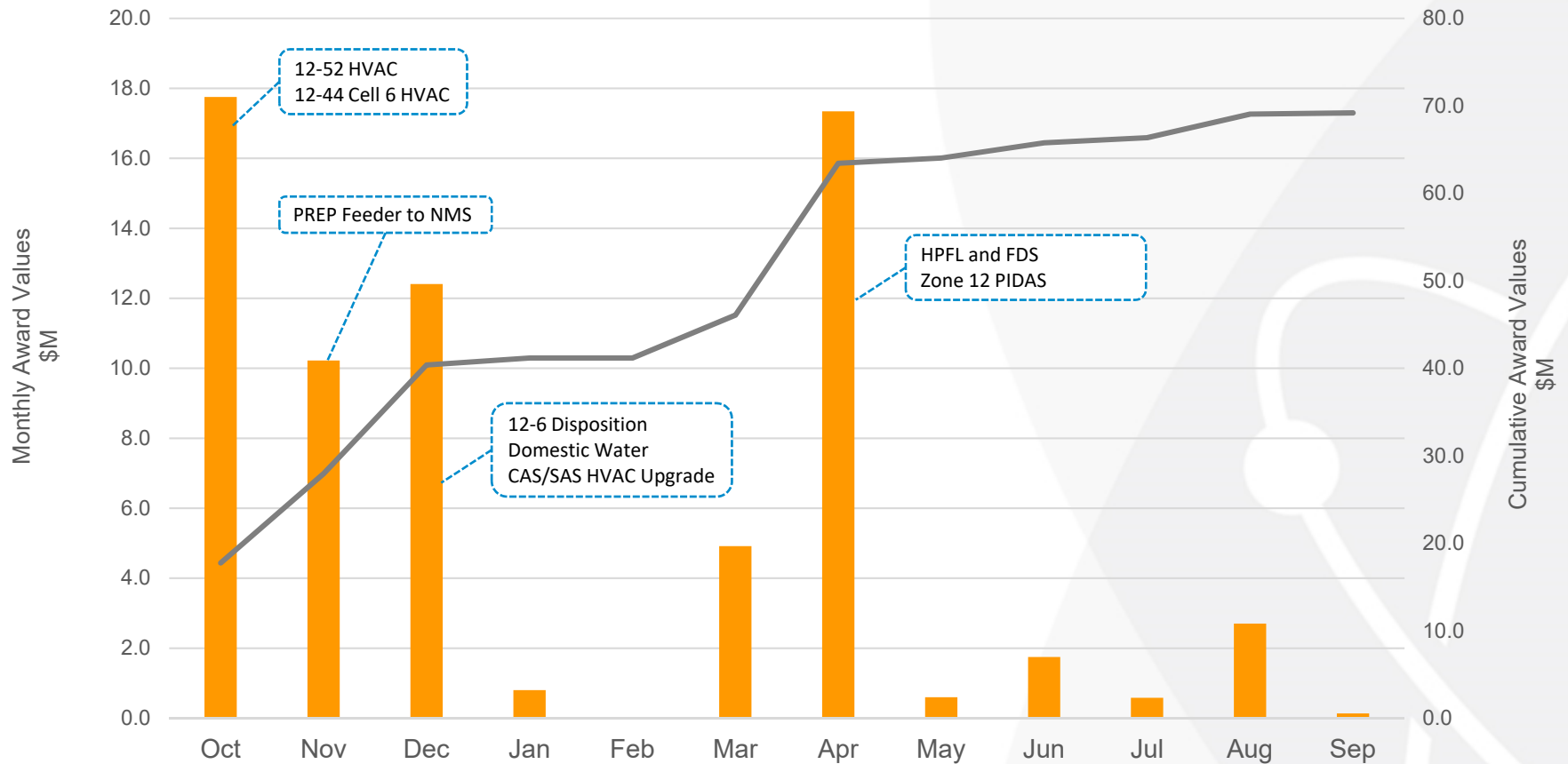
FY22 through FY25 Pantex & Y-12 Projections

Forecasted Expenditures for Contracts and Materials (\$M)



Pantex FY23 Procurement Awards

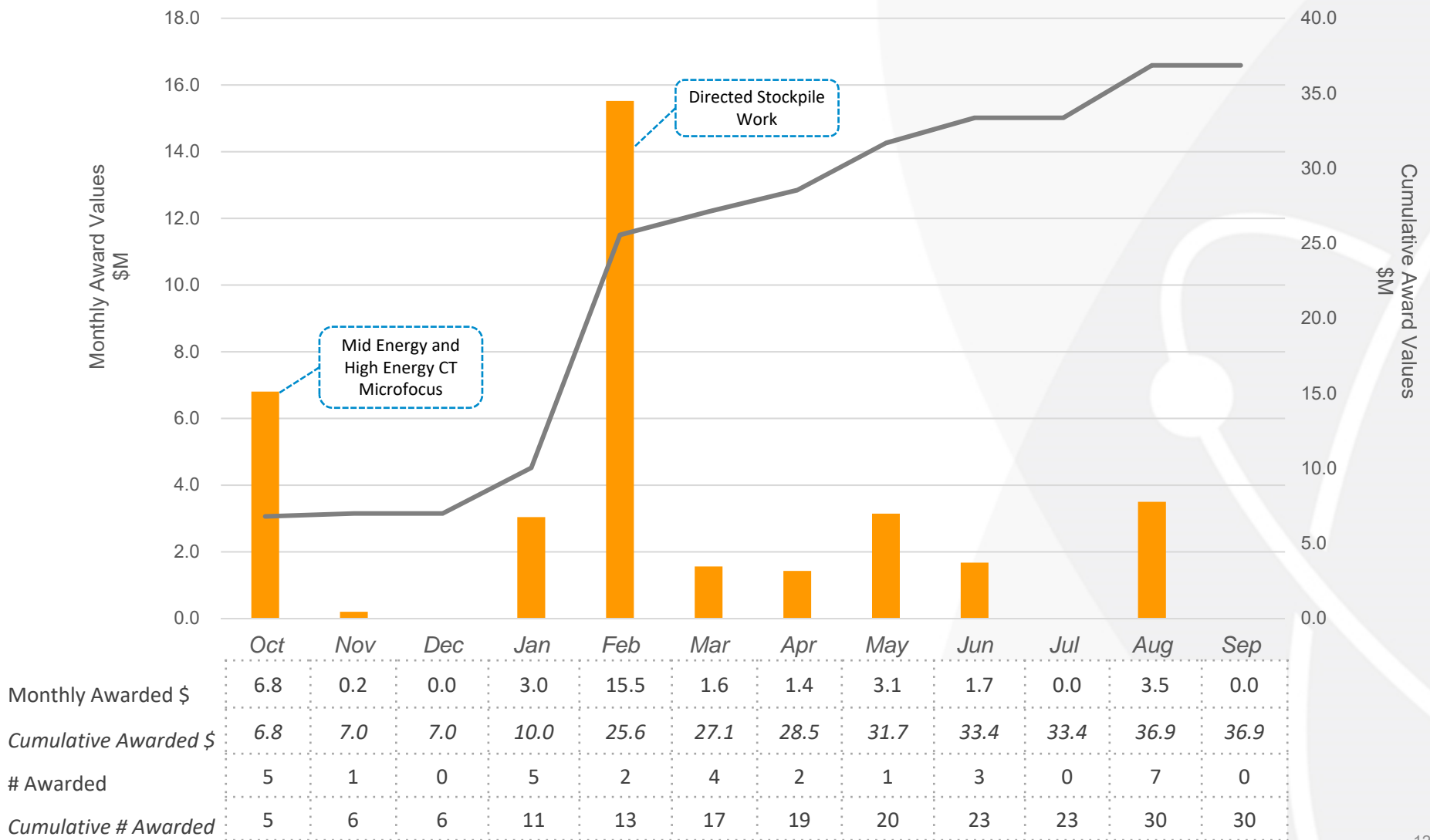
➤ 31 contract awards for equipment, design and construction contracts projected for FY23 estimated at \$69.2M



Monthly Awarded \$	17.8	10.2	12.4	0.8	0.0	4.9	17.3	0.6	1.7	0.6	2.7	0.1
Cumulative Awarded \$	17.8	28.0	40.4	41.2	41.2	46.1	63.4	64.0	65.8	66.4	69.1	69.2
# Awarded	2	4	3	3	1	2	4	2	3	1	5	1
Cumulative # Awarded	2	6	9	12	13	15	19	21	24	25	30	31

Y-12 FY23 Procurement Awards

➤ 30 contract awards for equipment, design and construction are forecasted in FY23 estimated at \$36M





Question & Answer

***Please Submit Questions Using Index Cards
or Via Chat in WebEx (Send to All Panelists)***



CNS Procurement Forecast

Rick Hillert

Ricky.Hillert@pxy12.doe.gov

CNS Director Procurement Operations



Procurement Opportunities (Pantex) FY23 Q1&2

Project	Comp Type	Est Price	Est Date	Comment
Environmental Chambers & Equipment Skids	Small Business Setaside	\$250K - \$1Mil	Q2	Construction
CAS/SAS HVAC and UPS Upgrade	TBD	\$1 - \$3 Mil	Q1	Construction/Architect/Engineering
Bldg. 12-121 5-CNC Saw Replacement (facility modification)	Small Business Setaside	\$250K - \$1Mil	Q2	Construction
Bldg. 12-121 5-Axis Mill (facility modification)	Small Business Setaside	\$250K - \$1Mil	Q2	Construction
Domestic Water Phase II - Water Plant to Tanks	Small Business Setaside	\$1M - \$10M	Q2	Construction
Special Tooling Nexus Mill	Small Business Setaside	\$250K - \$1M	Q2	Construction
Zone 4 Generator Load Bank	Small Business Setaside	\$1M - \$1M	Q2	Construction
Engineering Services	Full and Open	\$1M - \$10m	Q2	Services

Procurement Opportunities (Y-12) FY23 Q1&2

Project	Comp Type	Est Price	Est Date	Comment
Lithium Processing Facility HMG Furnace	TBD	\$1-2 Mil	Q1	Fabricated Equipment
D&D Basic Ordering Agreement	Full & Open	TBD	Q1	Construction
Systems/Digital Engineering BOA	Full and Open	\$1M - \$10m	Q2	Services
Engineering Services	Full and Open	\$1M - \$10m	Q2	Services
Possessing facility BOA	Full and Open	\$1M - \$10m	Q2	Services
Undefined Service and equipment purchases	TBD	\$250K - \$1 Mil	Q2	Requirements in review

Additional Forecast Details

CNS Procurement provides the forecast of subcontracting opportunities for FY2023.

- These requirements may be revised or cancelled, depending on program budget funding or departmental needs.

CNS Forecast Site

<https://www.y12.doe.gov/suppliers/procurement/subcontracting/subcontracting-forecasts/cns-forecast>

If you have questions or would like to express an interest in any of the opportunities listed in the previous slides, contact:

[**procurement@pantex.com**](mailto:procurement@pantex.com) (Pantex)

[**procurement@y12.doe.gov**](mailto:procurement@y12.doe.gov) (Y-12)

System for Award Management (SAM)

- All Offerors must be registered with the System for Award Management (SAM.) Offerors not registered will be ineligible for award.
- SAM registrations have to be renewed annually
- To register or renew:
 - <https://www.sam.gov>
 - Call: (866) 606-8220
- For assistance (create an incident report or initiate a live chat) visit the Federal Services Desk at: <https://www.fsd.gov>.
- Initiate registration renewal no later than one month before expiration.
- To avoid delays, Register/Renew via sam.gov, not a third party.
- Free assistance is available through local Procurement Technical Assistance (PTAC) and Small Business Development Centers.
- Effective April 4, 2022, SAM and other federal government systems began using the Unique Entity Identifier (UEI) rather than DUNS. For information about this, and the impact on your sam.gov registration, visit: <https://www.sam.gov/content/duns-uei>



Question & Answer

***Please Submit Questions Using Index Cards
or Via Chat in WebEx (Send to All Panelists)***



Introduction to Y-12 Firehouse Project & Geiger Brothers

Troy Cherry

Troy.Cherry@pxy12.doe.gov

Y-12 Procurement Projects & Production





Y-12 Firehouse Contractor: Geiger Brothers



Scott Massie
smassie@geigerbrothers.com
Chief Executive Officer

Terry Spencer

tspencer@geigerbrothers.com

Vice President
of Operations –
East Tennessee





Building Relationships • Engineering Solutions



WHAT WE DO

- Construction
- Service & Maintenance
- Fabrication
- Engineered Solutions



MARKETS WE SERVE

- Nuclear
- Infrastructure
- Healthcare
- Commercial
- Educational
- Manufacturing
- Power
- Maintenance



CURRENT CLIENTS

Ohio University • The Ohio State University • Nationwide Children's Hospital • The Ohio State University Medical Center • OhioHealth • US Army Corp of Engineers • Department of Energy • Oak Ridge National Lab • Nationwide Arena • General Mills • Speyside Bourbon Cooperage • Grange Insurance • Battelle • Andelyn Biosciences • Nestle • Hilton Easton • Colgate Palmolive



3 OFFICES



165 EMPLOYEES

6 SAFETY PROFESSIONALS



30 Signatory to over
LOCAL UNIONS

3 REGISTERED
PROFESSIONAL
ENGINEERS

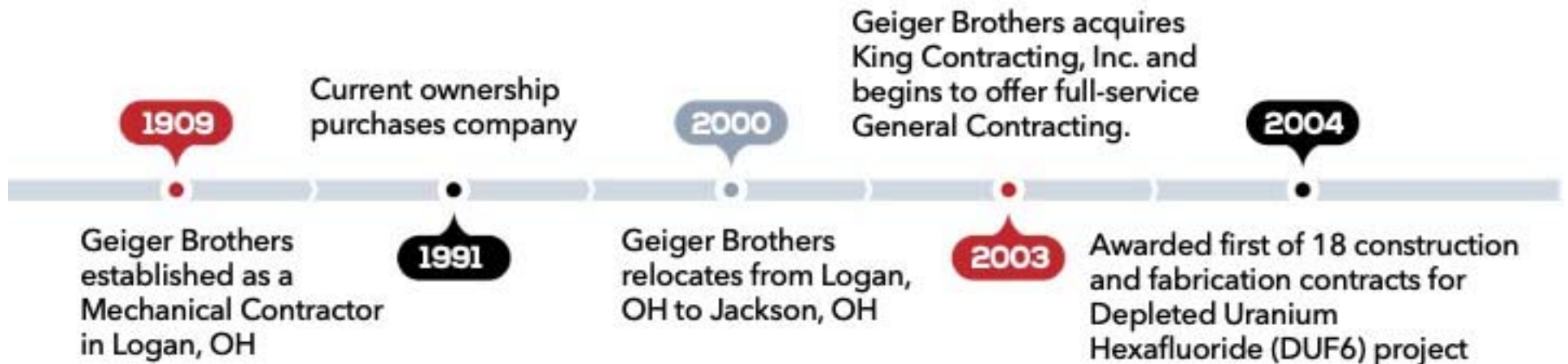
6 ENGINEERING
INTERNS





OUR HISTORY

What was started by J.A. Geiger in 1909 as a "one man and a truck" plumbing sole proprietorship has evolved over the last 100+ years into a full-service construction and engineering firm.





OUR HISTORY

2016

Awarded first project in Oak Ridge, TN for the UPF project with Bechtel Corporation

2020

Electrical and controls work integrated for full-service capabilities in construction and service/maintenance

2023

Geiger Brothers receives multi-year Mentor-Protégé contract with Fluor at DOE Portsmouth D&D

2017

Opened branch offices in Columbus, OH (to focus on Service/Maintenance) and Oak Ridge, TN (to explore other opportunities in East Tennessee)

2021

Geiger Brothers will transition to an employee-owned company (ESOP) to empower our team to lead us into the future



PRECONSTRUCTION - THE ROADMAP TO SUCCESS



- Historical Data - Current Market Adjustments - Cost Validation
- Value Management and Market Intel (Commodities and Specialties)
- GMP's
- Early Procurement of Long Lead



SUBCONTRACTING PROCUREMENT STRATEGIES

- **Relationships Matter**
 - Be A Trusted Partner & Vice-Versa
 - Resources Are Limited With Subcontractors
- **Design-Assist Methodology**
 - Use In Conjunction With Preconstruction
 - Mostly Utilized With MEP Trades
- **Value-Based Subcontractor Selection**
 - Safety-Quality-Schedule-Cost

10 STEPS TO A QUALITY PROJECT





WHEN THINGS DON'T GO WELL "NEVER LEAVE YOUR WINGMAN"

- COVID-19
- Massive Supply Chain Disruptions
- Inflationary and Force Majeure Complications
- Skilled Labor Resource

To Succeed Together - Must Figure It Out Together



Y-12 FIREHOUSE

- Designed by BKV Group and H2M Teamed with MBI
- Cutting Edge Fire Station & Training Facility Allowing for 365/24/7 Operation

Y12 FIRE DEPARTMENT
* COURAGE * STRENGTH * HONOR *



Houses First Responder Personnel:

- Firefighters
- Emergency Medical & Transport
- Hazardous Material Spills Mitigation
- Technical Rescue

32,000 SF Total Footprint:

- 20 Bunk Rooms
- 9 Drive-Thru Bays
- State-Of-The-Art Fitness Room





Subcontractor Overview: *approximate value of subcontracts issued \$15 Million*

Local (Oak Ridge and Knoxville)

Hatfield (Concrete)

Barnhart (Steel Erection)

Wm. S. Trimble Company (Operable Wall Systems)

Miller Electric (Electric)

Hicks & Ingle (Fire Protection, Plumbing, HVAC)

C3 Industrial Blasting (Painting)

TJ Wies Contracting (Interior Partitions)

Kone (Elevators)

CTI and Associates, Inc. (Site Development & Utilities)

Action USA, LLC (Aluminum Storefront / Glazing)



Subcontractor Overview: *approximate value of subcontracts issued \$15 Million*

Outside Area Subcontractors

Smith Seckman Reid (MEP Systems Commissioning)
Nashville Office Interiors (Furnishings)
Harris Floor Covering (Flooring Systems)
Central Masonry (Masonry-Brick/CMU)
Carl T. Johnson (Roofing)
Steve Ward & Associates (Casework)
Marek Brothers Systems (Window Treatments)
Hartman Walsh (Specialty Concrete Floor Finishes)



Building Relationships • Engineering Solutions



Question & Answer

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Subcontract Management Program (SMP), A.K.A. the STR Program

Michael Mulligan

Michael.Mulligan@pxy12.doe.gov

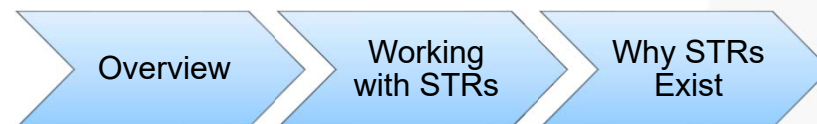
Subcontract Management Program Lead



The Wedding Game

How Long Has Your Company Worked at Pantex and/or Y-12?

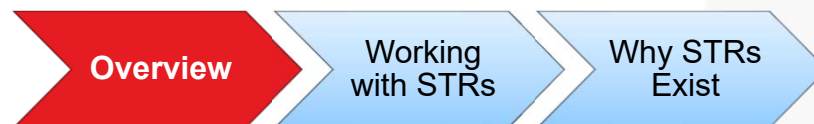
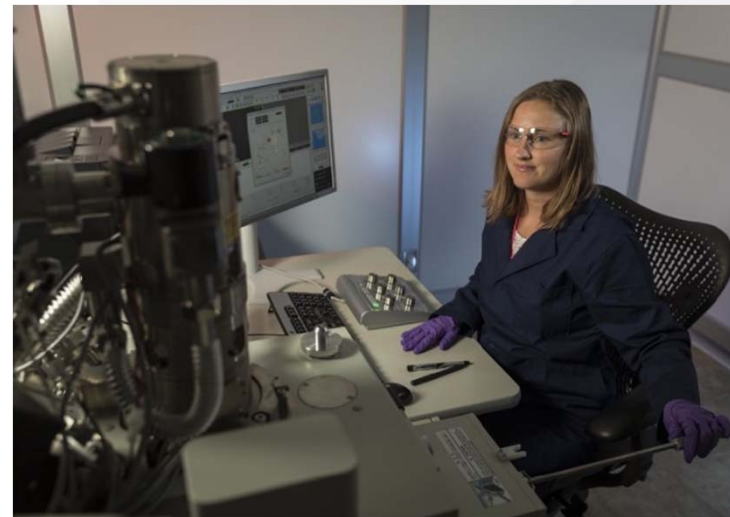
- 1 Year or Less
- Greater than 1 Year, Less than 2
- Greater than 2 Years, Less than 5
- 5 Years or More
- 10 Years or More
- 20 Years or More
- 35 Years or More
- 50 Years or More
- 65 Years or More
- 79 Years or More



Overview of STR Program

What It Is

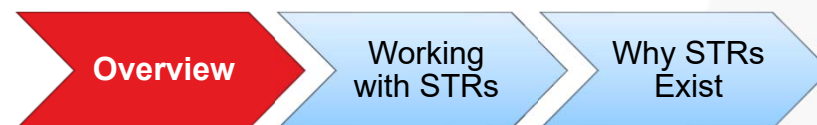
- Establishes standards for technical oversight of CNS' subcontracts and task orders (TO's)
- From Initiation of the Purchase Req through Solicitation of Bids, Subcontract Award, Execution, and Closeout
- Holds Accountable the Roles, Responsibilities, and Authorities of CNS Personnel involved in subcontracted activities
- Establishes the Qualifications and Training Requirements applicable to the Roles within the SMP



Overview of STR Program (cont.)

Roles

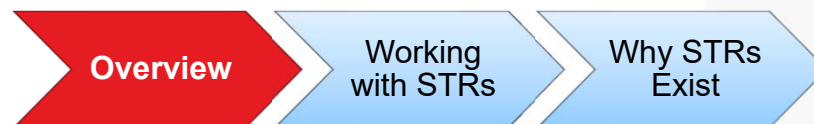
- PR (Procurement Representative, a.k.a. Buyer, Subcontract Administrator):
 - Responsible for the subcontract administration of a Company subcontract, with technical input from the STR. The PR is the only Company individual, delegated the authority through Supply Chain Management, to make Company commitments and enter into a contract with a vendor (subcontractor) and make any changes or modifications to the subcontract on behalf of the Company.
- LSTR (Lead STR):
 - Supports SMPL in administering the SMP and serves as their respective department's STR point of contact to address subcontract management issues and administer Y-12- or Pantex-specific procedures and processes. Provides leadership and mentoring to other STRs within their department or group OR other STRs performing in a similar function, as needed. This is typically a supervisor or manager who is STR-qualified in their business unit.



Overview of STR Program (cont.)

Roles (cont.)

- STR (Subcontract Technical Representative):
 - **STR2 (STR-Tier 2):** Delegated authority by the PR to oversee subcontracts that typically do not require subcontractors to perform physical work on site and may consist of lower risk, light duty work activities. Service-type subcontracts with moderate to high risk may be appointed to a STR2 based on a requesting organization's needs, manager discretion, and the appointed individual's experience and background commensurate with the subcontract requirements. The STR2 is not trained or authorized to perform the duties of a STR1 (i.e. Construction-type subcontract duties).
 - **STR1 (STR-Tier 1):** Delegated authority by the PR to oversee subcontracts that require subcontractors to perform physical work on site and typically requires a work permit (e.g., requires interface between the Company's Divisions in the process of submitting and receiving Activity Hazard Analysis (AHA), permitting for utility locations, excavation/penetrations, Lock Out/Tag Out (LOTO). Typically oversees Construction-type subcontracts and work that can only be carried out by the exercise of special skills and care, that involves a risk of harm if done unskillfully or carelessly).



Overview of STR Program (cont.)

What Subcontracts Require Formal STR Appointments?



- Agreements of any dollar value that the work will be performed on-site (which includes any facilities leased or managed by CNS).
- High-risk, off-site agreements as defined in Company procedures. These are generally complex, expensive, fabricated equipment purchases, or agreements where the failure of an item could impact the environment, the safety, or the health of Company employees.
- Off-site agreements when milestone or progress payments are included.
- Agreements of any dollar value, if determined appropriate by the Procurement Representative, or the requestor's Senior Manager or Department Manager, based on the complexity of the agreement and risk.

Overview

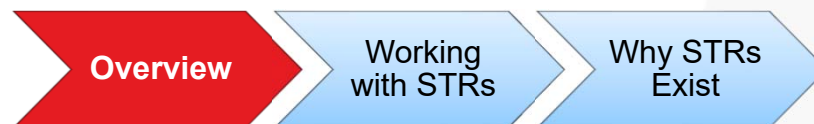
Working
with STRs

Why STRs
Exist

Overview of STR Program (cont.)

What It Is NOT

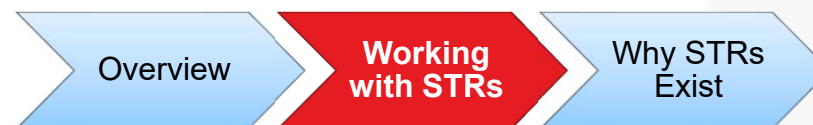
- Not a 'Rubber Stamp Operation'
- Limitations to STR Authority (see *Technical Direction Clause* in Section F of subcontracts)
 - STR may provide written information to the Seller that assists in interpreting drawings, specifications, or technical portions of the work description.
 - STR may provide technical guidance to the Seller as long as the advice does not result in a change to the subcontract.
 - Technical direction must be within the scope of work/specification stated in the subcontract. The STR does not have the authority to, and may not, issue any technical direction that:
 - Constitutes an assignment of additional work outside the Statement of Work/Specification
 - Constitutes a change as defined in the "Changes" clause
 - In any manner causes an increase or decrease in the agreement price or total estimated cost, the fee (if any), or the time required for Agreement performance
 - Changes any of the expressed terms, conditions or specifications of the Agreement or;
 - Interferes with the Seller's right to perform in accordance with terms and conditions of the Agreement
- **Bottom Line:** All technical direction shall be issued in writing by the STR. Any recommended changes to the subcontract must pass through the PR who can authorize formal subcontract modifications.



Working with STRs

How STRs are Assigned

- If the subcontract requires a formal STR Appointment, the requesting organization (that creates the purchase requisition) will nominate someone from their organization who is STR-qualified (either Tier-2 or Tier-1).
- Depending on the requirements of the subcontract, STRs may be involved with some, most, or all of these steps in the Procurement Process:
 1. Identify requirement & procurement planning
 2. Prepare specification & Statement of Work
 3. Assemble purchase request documents
 4. Pre-bid conference
 5. Evaluate proposals
 6. Post-award orientation & subcontract administration
 7. Quality assurance
 8. Property control / acceptance
 9. Payment and accounting
 10. Subcontract modifications
 11. Closeout



Why CNS Has STRs

Their Purpose

- To provide technical oversight of CNS' subcontracts and task orders (TO's).

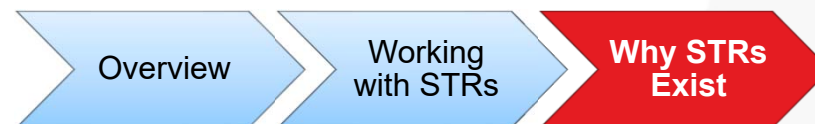
Your Working Relationship

- “Think Communication Triangle . . .”



The Communication Triangle

- Only the Procurement Representative and the STR should communicate with the subcontractor/supplier. Other interested/involved parties **must not** provide technical or business instruction to the supplier.





Question & Answer

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Procurement Technical Assistance Center (PTAC) & SAM.gov Update



Jutta Bangs

PROCUREMENT TECHNICAL ASSISTANCE CENTER (PTAC)

Brought to you by UT PTAC



Who We Are

- PTAC is funded, in part, by the U.S. Department of Defense and is administered through a cooperative agreement with the Defense Logistics Agency.
- PTAC services are delivered to you at **no charge**.



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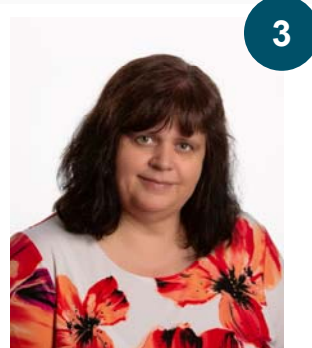
Veronica Clark

West Tennessee



Debbie Barber

Middle Tennessee



Jutta Bangs

East Tennessee



Paul Middlebrooks

Program Manager



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Russell Toone

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SBIR/STTR Innovation Specialist



**Paul
Middlebrooks**

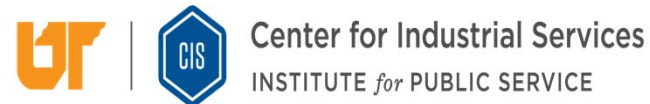
paul.middlebrooks@Tennessee.edu



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- **Counseling** on all matters related to government contracting (local, State, and Federal – all agencies).
- **Training** on how to get started, and advanced topics.
- **Conferences** for specific industries (construction, manufacturing, etc.) or specialty topics.
- **Bid Opportunity Searches**, hands-on assistance with websites and databases.



- **Referrals** to 3rd party providers where needed.
- **Contract Solicitation Review**, how to analyze and make go/no-go decision.
- **Federal Acquisition Regulations (FAR)**, understand and comply.
- **Marketing Strategy**, help with tools like capability statements, elevator pitches, and capability briefings.

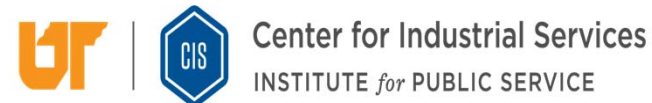


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Specialty areas of service

- CMMC (DoD requirement)
- Cyber security compliance
- Innovation support SBIR/STTR
- Small business certifications [8(a), HUBZone, EDWOSB/WOSB, Vets First]
- State of TN certifications GoDBE
- Manufacturers (specific assistance, esp. for DoD work)





94

center

s

300

office

Find your local PTAC outside of
Tennessee at: www.aptac-us.org



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Changes to the System for Award Management



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UNIQUE ENTITY ID (SAM)

- ✓ 12-character alphanumeric value
- ✓ Assigned, managed, and owned by the federal government
- ✓ Validates your organization's legal business name and address

GSA



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TENNESSEE
PTAC
PROCUREMENT TECHNICAL ASSISTANCE CENTER

What Changed with the Unique Entity ID and Entity Validation (1 of 3)

As of April 4, 2022, the federal government stopped using the DUNS Number to identify entities.

- The **Unique Entity ID** is now the authoritative identifier
- DUNS Number is not available in IAE systems
- Because you get a Unique Entity ID in SAM.gov—the DUNS Number is no longer required for federal award purposes
- If you need to update your legal business name, address, etc. you now make the changes in SAM.gov



Source: GSA



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What Changed with the Unique Entity ID and Entity Validation (2 of 3)

At that same time, SAM.gov changed providers for entity validation services (EVS).

- Validating an entity's unique legal business name and physical address has always been a part of registration in SAM.gov. The EVS independently verifies the uniqueness of an entity.
- Before April 2022, it was done outside of the system. Now it is done within SAM.gov.
- Updates to an entity's legal business name and physical address are now done in SAM.gov.
- Some entities that were validated prior to this change do not have their information in the new database.



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What Changed with the Unique Entity ID and Entity Validation (3 of 3)

The reasons for validation have not changed.

Validation is required when you:

- register an entity
- renew your entity registration each year
- get a Unique Entity ID, and
- update or change your entity's name or address

Entities whose information is not showing up or not showing up correctly in SAM.gov need to provide documentation to verify their correct entity information.



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When a non-federal user gets a SAM.gov account, this is what your Workspace looks like.

If you've never registered before, go to this link, **“What do I need for registration?”**

If you are with an entity that has a registration and are not authorized to update the registration, use the **“Add a New Role”** form to request authorization from your entity administrator.

Workspace

Entities

Entities

0 ACTIVE REGISTRATION 0 WORK IN PROGRESS REGISTRATION 0 SUBMITTED REGISTRATION 0 ID ASSIGNED 0 PENDING ID ASSIGNMENT

Next Update Due: Due in Next 30 days: 0 Entities

Register Your Entity or Get a Unique Entity ID **Renew/Update Your Entities**

[What do I need for registration?](#) Select Renew/Update to go to your entity workspace and renew/update your entities. [How to renew or update an entity?](#)

Get Started Renew/Update

System Accounts

0 ACTIVE 0 DRAFT 0 CHANGE REQUEST 0 PENDING 0 DEACTIVATED

Profile

Downloads Saved Searches Following

Pending Requests

No pending requests [See All](#)

Notifications

No available notifications [See All](#)

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, contact an administrator for your organization directly.

Select a Role

I verify I have a business need for this role.

Request Role

If you need to update information on your registration or do your annual renewal, you can select the number in the bubble or select the "Renew/Update" button.

The screenshot shows a 'Workspace' dashboard. At the top, there are five status bubbles for 'Entities': 'ACTIVE REGISTRATION' (1), 'WORK IN PROGRESS REGISTRATION' (0), 'SUBMITTED REGISTRATION' (0), 'ID ASSIGNED' (0), and 'PENDING ID ASSIGNMENT' (0). Below these is a 'Next Update Due: Jun 21, 2022' and 'Due in Next 30 days: 0 Entities'. The main content area is split into two columns: 'Register Your Entity or Get a Unique Entity ID' with a 'Get Started' button and a link 'What do I need for registration?'; and 'Renew/Update Your Entities' with a 'Renew/Update' button and a link 'How to renew or update an entity?'. Below this is a 'System Accounts' section with five bubbles: 'ACTIVE' (0), 'DRAFT' (0), 'CHANGE REQUEST' (0), 'PENDING' (0), and 'DEACTIVATED' (0). On the right side, there is a 'Profile' section with a user icon and three buttons: 'Downloads', 'Saved Searches', and 'Following'. Below that is 'Pending Requests' (No pending requests) and 'Notifications' (two notifications about contract opportunities). At the bottom right is 'Add A New Role' with a dropdown menu and a 'Request Role' button.

The screenshot displays a web application interface. On the left, a sidebar titled "Show Workspace For Non-Federal Entities" contains a list of options: "Non-Federal Entities", "BioPreferred Reporting", and "Service Contract Reporting". Below this is a "Filter By" section with a "Search by Keyword" dropdown. The main content area shows details for a single entity, "LLC", with an "Active Registration" status. Fields include "Unique Entity ID", "CAGE/NCAGE: (blank)", "Purpose of Registration: Federal Assistance Awards", and "Physical Address: Brooklyn, NY 11207-1645 USA". At the top right, there are navigation controls: "1 of 1" entities, "Results per page" set to 25, and a "Sort by" dropdown set to "Expiration Date Ascending". An "Actions" menu is open over the entity details, listing "View Record", "Update", "Deactivate", and "View In Hierarchy". A red arrow points from the text below to the "Update" button in the actions menu.

Selecting the widget title or one of the numbers from the Entities widget will show your entity, or a list of entities if you have more than one.

To update or renew, select the button with the three vertical dots, then choose "Update."

Then, your entity information as it is currently in SAM.gov will populate in the name and address fields.

Make your updates to your entity information here, if it has changed. Then, select “Next.”

YOUR ENTITY REGISTRATION INFORMATION:

ELVEN FILE LLC • Active Registration	
UNIQUE ENTITY ID	PURPOSE OF REGISTRATION FEDERAL ASSISTANCE ONLY
CAGE/NCAGE (blank)	EXPIRATION DATE MAR 7, 2023

Enter Entity Information

Legal Business Name
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
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

Street Address 1

Street Address 2 (Optional)

ZIP Code (+4)

City

State

I would like to update/renew my e...
Updates to your entity registration information validation, which can take up to ten business days, cannot be made until the submitted information is approved. An entity registration must be updated before it will expire if you do not renew it in time. An entity registration that expires will prevent you from doing business with the federal government.

To see comprehensive instructions and checklists, visit the Entity Registration Users Guide.

Then, the EVS will check your entity information. The system could return an exact match, multiple similar matches, or no match.

Enter Entity Information

All the following information will be used to validate your entity, unless marked as optional.

No Match

We were unable to find a match for the information you entered. Please check your information and try again. If you are unable to find a match, select **Create Incident** to contact the Federal Service Desk (FSD).

[Create Incident](#)

Legal Business Name

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

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.

No Match

Validate Entity Information

The information you provided matches the following entity. If this is your entity, select **Next** to continue.

YOU ENTERED

Management Office, Inc., LLC
 12345 Main St
 UNITED STATES

WE FOUND THE FOLLOWING MATCH

Management Office, Inc., LLC
 12345 Main St
 USA

Unable to find a match?

If the match above is not your entity and you are unable to find a match, select **Create Incident** to contact the Federal Service Desk (FSD.gov) for assistance.

[Start Over](#) [Create Incident](#)

Exact Match

Validate Entity Information

The information you provided matches the following entities. Select your entity from the matches, and then select **Next** to continue.

CURRENT INFORMATION

Management Office, Inc., LLC • Active Registration
 Unique Entity ID
 Physical Address
 UNITED STATES

WE FOUND THE FOLLOWING MATCHES

Showing 1 - 4 of 4 results

- Management Office, Inc., LLC
- Management Office, Inc., LLC
- Management Office, Inc., LLC
- Management Office, Inc., LLC

Unable to find a match?

If the match above is not your entity and you are unable to find a match, select **Create Incident** to contact the Federal Service Desk (FSD.gov) for assistance.

[Start Over](#) [Create Incident](#)

Multiple Matches



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If the system returns an exact match, and all of the information showing is correct for your entity, select “Next” to continue updating the rest of your registration.

If something is incorrect or out of date, you must select the “Create Incident” button on the page.

Do not try to validate other combinations of information to find a match if you already submitted the correct information the first time.

Validate Entity Information

The information you provided matches the following entity. If this is your entity, select **Next** to continue.

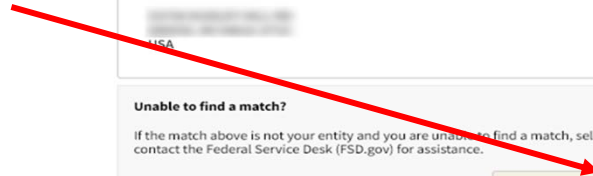
YOU ENTERED

Management Services, LLC
UNITED STATES

WE FOUND THE FOLLOWING MATCH

Management Services, LLC
USA

Unable to find a match?
If the match above is not your entity and you are unable to find a match, select **Create Incident** to contact the Federal Service Desk (FSD.gov) for assistance.



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If the system returns multiple matches, and one of the matches is your correct entity information, select it and then select “Next” to continue updating the rest of your registration.

If something is incorrect or out of date, you must select the “Create Incident” button on the page.

Validate Entity Information

The information you provided matches the following entities. Select your entity from the matches, and then select **Next** to continue.

CURRENT INFORMATION

██████████ **LLC** • Active Registration

Unique Entity ID
██████████

Physical Address
██████████

UNITED STATES

WE FOUND THE FOLLOWING MATCHES

Showing 1 - 4 of 4 results

- ██████████
- ██████████
- ██████████
- ██████████

Unable to find a match?

If the match above is not your entity and you are unable to find a match, select **Create Incident** to contact the Federal Service Desk (FSD.gov) for assistance.

Multiple Matches

If the system can't find a match, you must select the "Create Incident" button on the page.

Enter Entity Information

All the following information will be used to validate your entity, unless marked as optional.

No Match
We were unable to find a match for the information you entered. Please check your information and try again. If you are unable to find a match, select **Create Incident** to contact the Federal Service Desk (FSD).

Create Incident

No Match

Legal Business Name

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

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

Street Address 1

Street Address 2 (Optional)

ZIP Code (+4)



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Selecting the “Create Incident” button gives you this form*.

You must attach documents to this form that prove your current, correct entity information.

**This form could look slightly different depending on when in the validation process you opened it. The requirement to attach documents that prove your information is the same.*

Validate Entity Information

Create Incident

The Federal Service Desk will receive and review your entity validation information. You must add attachments and enter any additional details for best customer service results.

Issue Type	Subject
EVS - Inquiry	Multiple Validation Matches Found

1. Is your previously validated information still correct?

I affirm this is my entity's current, correct legal business name and address.

LLC

Physical Address

USA

My information is not correct.

2. Provide supporting attachments.

To finish your validation, you **must** attach documentation that proves your current, correct business information.

[View the list of acceptable documentation and file types.](#)

Attach documentation to verify your:

- Legal business name
- Physical address
- Date of incorporation
- U.S. state of incorporation (U.S. entities only)
- National identifier (non-U.S. entities only)

Drag file here or [choose from folder](#)

Attachment Name	File Size (KB)	Virus Scan	Action
No Attachments			

3. Provide additional details.

Please provide any additional details that might help customer service correct your information.

In the text box below the area for uploading documents, clearly state what is incorrect about the match(es) found, describe which part of your information is not showing up correctly, or that no matches were found.

Provide the correct name, address, and other data you are documenting. List which documents validate which piece of your entity information.



Provide as much detail as possible to help the validation agents resolve the issue.



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Documents to Validate Legal Business Name and Physical Address

Entity Type	 Attach These Acceptable Documents (examples)	 Unacceptable Documents - Do Not Attach
All Entities	<ul style="list-style-type: none"> ● Certified copies of the following: <ul style="list-style-type: none"> ● 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 	<ul style="list-style-type: none"> ● 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



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Documents to Validate State and Date of Incorporation

Entity Type	 Attach These Acceptable Documents (examples)	 Unacceptable Documents - Do Not Attach
<ul style="list-style-type: none"> ● All Entities Located in the U.S. ● Tribal Governments ● U.S. Territories 	<ul style="list-style-type: none"> ● Anything from the Legal Business Name list that also includes the state and date of incorporation ● Entities that are not incorporated may be able to submit other documentation. 	<ul style="list-style-type: none"> ● Applications you submitted without evidence of receipt/approval from an authority ● Your own documents that have not been stamped/verified by an authority ● Screenshots from SAM.gov, dla.CAGE.mil, or any other government system that stores your name and address ● DUNS profiles ● Federal contract or grant award documents ● Notarized entity administrator letters ● IRS form W-9 (request for Taxpayer Identification Number) and IRS form SS4 (application for an Employer Identification Number) ● Leases
<p>International Entities</p>	<ul style="list-style-type: none"> ● Anything from the Legal Business Name list that also includes the country and date of incorporation ● Entities that are not incorporated may be able to submit other documentation. 	



What happens next, after I submit my incident for validation?

- If your information in SAM.gov needs to be corrected, you will be redirected to your Entities Workspace.
- If you affirm your previously validated information is still correct, you will be able to continue with registration or an update after submitting your documentation with your incident.
- In your Entities Workspace, there will be an “FSD Incident” link under the entity you are trying to validate. Use the “View” button to view your issue.
- If you receive a request for additional documentation, you must add it here, through the SAM.gov Workspace, not FSD.gov.



How do I check the status of my entity validation incident?

- **Check your email.** An email with your FSD incident number was sent to your inbox when you created your incident. Keep this email to reference your incident, and respond promptly to any requests from the entity validation team handling your incident.
- **Look at your Entities Workspace in SAM.gov.** You can attach any further required documentation in your Workspace or view your original request.





DO NOT DO THIS

- **Do not call or chat the helpdesk at FSD.gov.** Our agents cannot respond to validation issues over the phone or chat. Do not contact the GSA or award representatives. Only the agents receiving incident tickets from the SAM.gov site can validate your entity. They will communicate with you via your incident ticket by email only.
- **Do not submit multiple validation tickets for the same issue.** Creating multiple incidents does not expedite our handling of your incident and actually slows down the overall process. Incidents are processed in the order received.



Please be aware, there are delays in resolving open entity validation tickets at SAM.gov.

We are closely monitoring the situation and are working to address each ticket as quickly and efficiently as possible.

This is our top priority and will continue to be so until all validation requests are addressed.



All communication about your incident are handled by email by the agents on the EVS team.

Agents at FSD.gov cannot:

- provide incident status
- view documents submitted
- escalate your incident



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- Even entities already in SAM have to validate their entity again.
- Renew your SAM account at least 6 weeks prior to the date of expiration.
- Gather documents needed to validate, just in case.
- Update your capability statement to show the UEI, not DUNS number!
- To update your SBA Profile (aka SBA Supplemental Pages), you need to now create a GLS account.
- Via this GLS account you can update your SBA Profile (was done in SAM previously).
- **Contact your local PTAC office to assist you with SAM and the SBA Profile!**



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Question & Answer

***Please Submit Questions Using Index Cards
or Via Chat in WebEx (Send to All Panelists)***

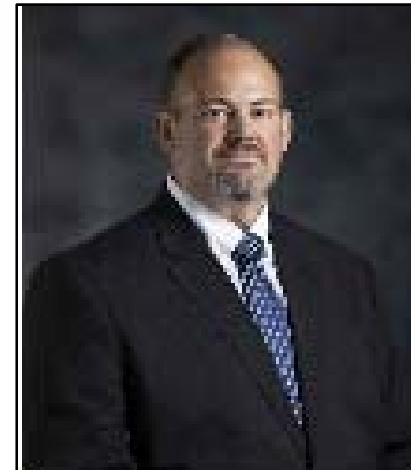


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