

An Overview of BETA.SAM by GSA Presented by Sue Gerardo with the Defense Logistics Agency

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In this document, topics of discussion include an overview of the BETA.SAM system, along with information regarding the Unique Entity Identifier (UEI). For BETA.SAM, the paper will discuss the involved programs and data sets, along with the various milestones and timelines for the transition. Regarding the Unique Entity Identifier, the move from Dun & Bradstreet to UEI, and the timeline for the change will be further clarified.

I. BETA.SAM

1. Overview

Currently, the General Services Administration (GSA) manages Federal acquisition and awards processes through 10 online websites. The ten online websites that handle these processes are undergoing a multi-year modernization cycle that will merge the sites into one streamlined environment for Federal award management.

BETA.SAM is the transition environment, and many organizations are working to transition completely. The term BETA.SAM.gov is used to distinguish itself from the legacy site, SAM.gov.

Original websites will continue to co-exist with BETA.SAM.gov until they are officially retired. The plan is for the original SAM.gov website to be retired and eventually be renamed as “SAM.gov,” which will become the official U.S. government website for people who make, receive, and manage Federal Awards. All data and relevant information will be brought over from the older websites, including entity registrations and historical contract data. This means that entity registrations will automatically transition.

Upon the completion of the modernization process, there will be a dedicated homepage with a single sign-on which will give users the resources needed to make, receive, and manage federal awards. Features will include one powerful search tool, one robust reporting tool, and one workspace containing relevant information regarding federal awards.

2. Diagram showcasing BETA.SAM transition

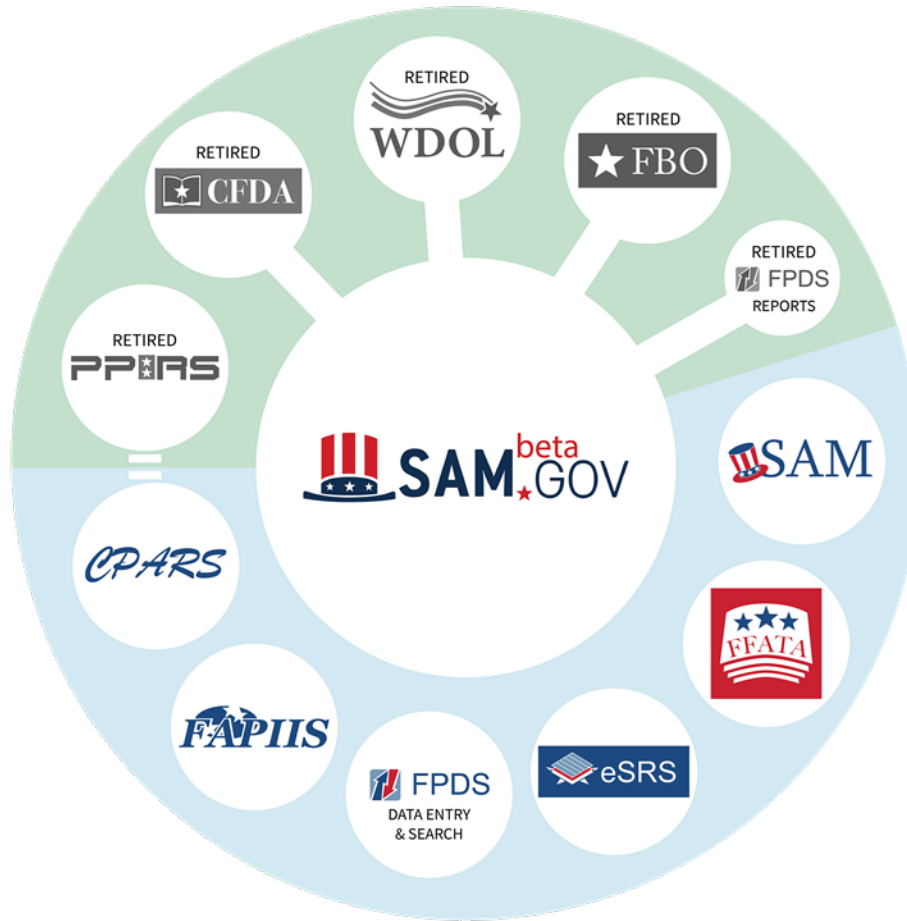


Figure 1. Department Logistics Agency. (2021, February 10). [Diagram depicting BETA.SAM transition].

- Important information to note is that FBO, the new name for Contract Opportunities, has transitioned to BETA.SAM.
- FPDS which has been used for Contract Data, will now only process Reports.
- PPIRS has been deactivated, and has now been consolidated under one site, which is CPARS.

3. BETA.SAM.gov Legacy Site Decommission Status Chart

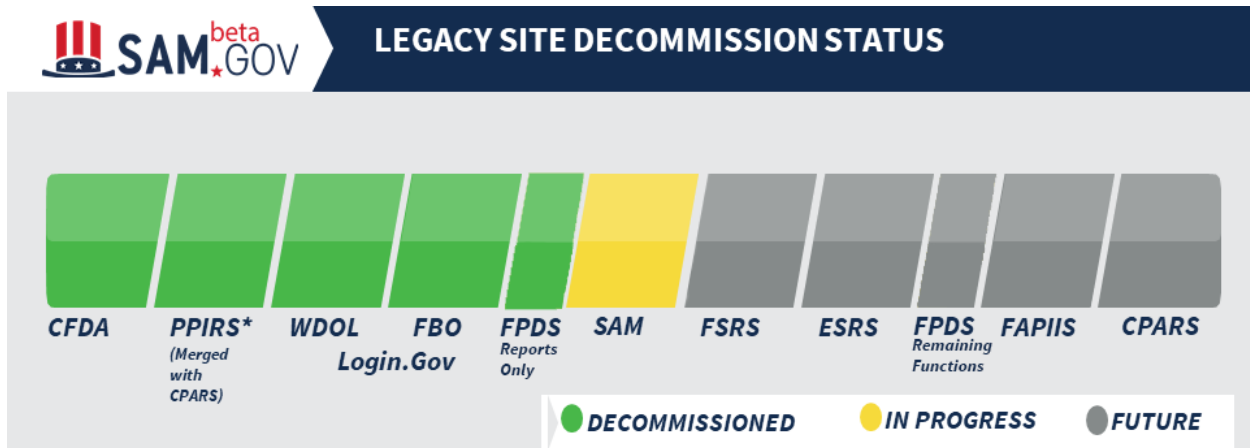


Figure 2. Department Logistics Agency. (2021, February 10). *BETA.SAM.gov legacy site decommission status chart* [Diagram].

4. Data Sets

- **FPDS Contract Data Reports are the official source for reports.**

The reports module in FPDS.gov has been retired, as the reports function of FPDS had been fully transitioned into the BETA.SAM.gov Data Bank on October 17, 2020. As BETA.SAM.gov is the only source to create and run contract data reports, only the reports function transitioned in BETA.SAM.

Data Bank now stores anomaly reports. The remaining features of FPDS are still in place. Users will also find information which is already publicly accessible pertaining to unclassified contract actions which are over the micro-purchase threshold. Contract actions can include definitive contracts, indefinite delivery vehicles (IDVs), delivery orders, purchase orders, and modifications.

Important Information to Know About FPDS:

- Understand that FPDS is the single authoritative repository for federal procurement award data.
- Annual certifications of data accuracy by agency heads will occur before the annual report is submitted to DPC.
- After consolidation of the report by DPC, it is sent to OFPP/Congress.
- OSD/OMB uses FPDS to report obligations and awards.

- **Assistance Listings/Catalog of Federal Assistance**

This is a government-wide catalog of federal programs, projects, services, and activities. It contains both financial and nonfinancial assistance programs for the American public. Information regarding eligibility requirements and an explanation of the application process are also provided.

- **FBO.gov – new term Contract Opportunities**

Contains a list of notices of proposed contract actions which are expected to exceed \$25,000. Various notices are included, such as solicitations, pre-solicitations, awards, and sole source justifications.

- **Continuation of Contract Opportunities**

Roles have been updated for this process.

- **Wage Determinations**

Information will be posted relating to required wage rates and fringe benefit rates that must be met on federal procurement contracts for each labor of category. The requirements are covered by the Davis Bacon Act or the Service Contract Act, which is ultimately determined by the U.S. Department of Labor.

- **Federal Hierarchy**

An organizational hierarchy of funding and awarding departments or independent agencies, sub-tier organizations, and offices will be made available.

- **Next modernization effort- Legacy SAM**

By May 24, 2021, GSA is hoping to transition all capabilities from and retire Legacy SAM. Agencies and services have until April to transition all SAM interfaces to the BETA.SAM Entity Management/Exclusions APIs, and APIs for Extract downloads. Testing can now be conducted in BETA.SAM's alpha environment, and specs are at <https://open.gsa.gov/api/>.

To see entity registrations, government users will be required to log in. Special roles will be required for sensitive data access.

Important: When referring to “entity,” the term means “vendor.”

- **Entity Information – SAM**

The definition of entity registrations involves having information collected from anyone interested in being in consideration for federal awards, which can include acquisition awards, assistance awards, or even both.

Exclusions assist in identifying those who are ineligible from receiving certain federal awards.

Identifiers within the account profile can involve various codes, such as the Dun & Bradstreet code, PSC code, CAGE code, Assessments, or Size of Business. the Dun & Bradstreet code will soon become obsolete, as vendors or entity accounts will switch to the Unique Entity Identifier code.

II. Unique Entity Identifier (UEI)

1. Overview

The new Unique Entity Identifier (UEI) system will be generated by the System for Award Management (SAM) and will overtake the D-U-N-S® (DUNS) number process as the new official identifier for firms doing business with the federal government.

The transition deadline from DUNS to the SAM-generated UEI system has been extended to April 2022. This directive has been encouraged by the Office of Management and Budget (OMB).

To maintain a full continuity of services, GSA will continue to work with Dun & Bradstreet (D&B) during the transitional window. This will include DUNS number assignment, monitoring, and validation of entity uniqueness.

2. Continuation

There will be no action needed on the part of entities (vendors) to receive a new UEI. A currently active registrant's UEI will be generated within SAM.gov before the transition, which started on October 24, 2020. Entities (vendors) registering on SAM.gov for the first time will have their UEI automatically generated during the registration process.

3. Benefits

With this change, registrants will no longer be required to acquire an identifier from a third-party. Each entity is unique, and the government has introduced competitiveness into entity validation services. The Federal Service Desk is the central helpdesk that entities should contact for assistance with registration or UEI issues.

4. Screenshots from BETA.SAM.gov showing where to locate Unique Entity Identifier

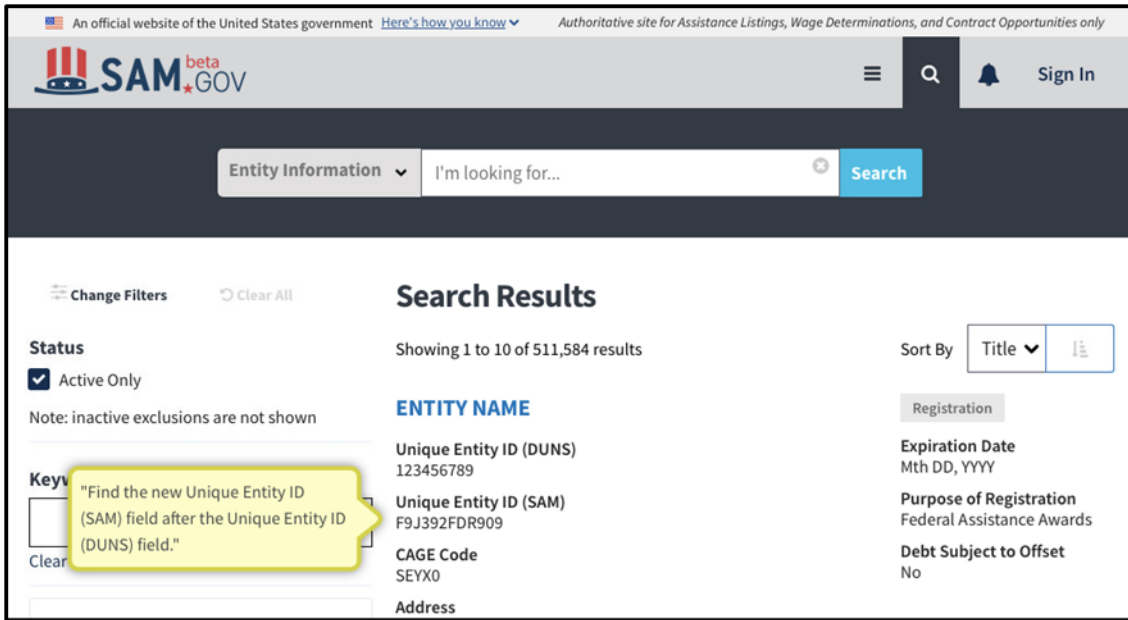


Figure 3. BETA.SAM.gov. (2021, February 10). [Screenshot from BETA.SAM.gov].

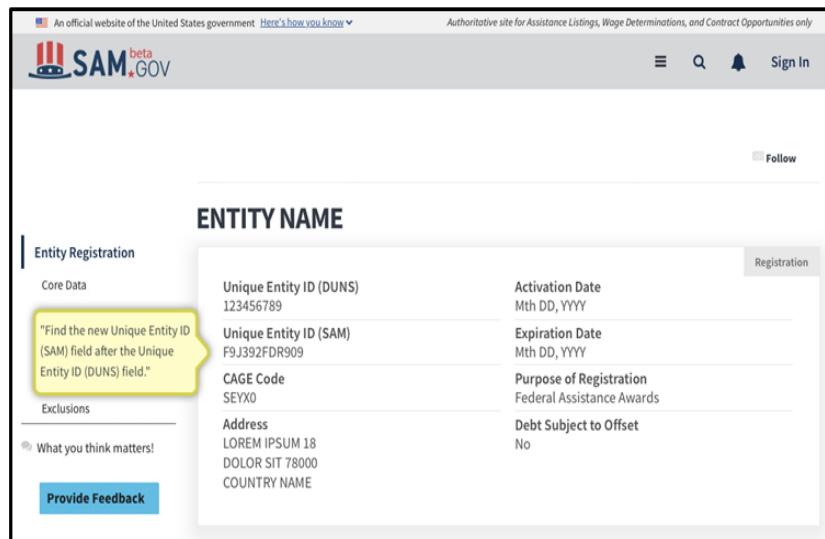


Figure 4. BETA.SAM.gov. (2021, February 10). [Screenshot from BETA.SAM.gov].

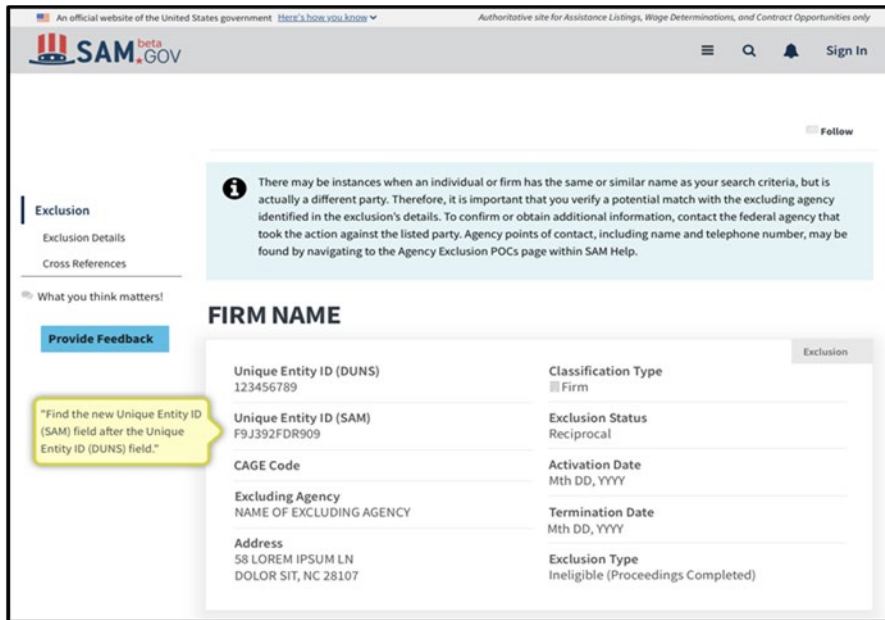


Figure 5. BETA.SAM.gov. (2021, February 10). [Screenshot from BETA.SAM.gov].

5. DLA Request for Change (RFC) BPR-C19-009 Highlights

Due to a change in the timeline from DPC/OMB, the transition is currently on hold and has been extended.

Under the UAT Phase, the delivery date and production will occur on the second week of February 2021.

The new system will enable EBS to receive and store the new UEI from SAM. UEI will also be added to the Index File (ECC/DIBBS). The EBS vendor master will also be updated to include the UEI.

Updated interfaces will include UEI while replacing DUNS. The procedure is based on the specifications provided by external system partners.

In addition, DUNS will be removed from the DIBBS vendor screens (508 testing).

To conclude, the process will map UEI to ECC to FPDS, SRM to FPDS, and BETA.SAM.

6. Timeline of UEI

System Impacts (1 of 3)

Functions impacted by UEI Change	Key Events	When Expected
beta.SAM.gov Contract Opportunities (award notices)	UEI viewable on screen	May 24, 2021 or shortly thereafter
	Data Entry	Starting October 1, 2021, COs can submit using DUNS or UEI Starting April 4, 2022, COs must use the UEI for data entry
	UEI in outgoing interfaces	Starting January 15, 2021, UEI is included in Contract Opportunities Get Public API V2 (required for data entry) Starting April 4, 2022, DUNS will not be updated
	UEI required for incoming interfaces	Starting January 15, 2021, Opportunity Management API v2 in production with UEI Starting April 4, 2022, DUNS no longer accepted
beta.SAM.gov Contract Data Reports	UEI fields are visible on screen	TBD

Figure 6. Defense Logistics Agency. (2021, February 10). [Chart depicting timeline of UEI].

System Impacts (2 of 3)

Functions impacted by UEI Change	Key Events	When Expected
beta.SAM.gov Entity Information	UEI in outgoing APIs and extracts	Entity and Exclusions Extracts v2 (v3 sensitive) on 10/24/2020 Entity Management and Exclusions API v2 on 1/15/2021
	UEI fields are visible on display screen	4/26/2021 or shortly thereafter
	UEI assigned and viewable on screen	4/26/2021 or shortly thereafter
	UEI validation process within SAM.gov	TBD
	UEI required for commencing registration	UEI Optional after 10/1/2021 UEI Mandatory on 4/4/2022

Figure 7. Defense Logistics Agency. (2021, February 10). [Chart depicting timeline of UEI].

System Impacts (3 of 3)

Functions impacted by UEI Change	Key Events	When Expected
eSRS/FSRS	UEI fields are visible on screen UEI values are visible on screen	TBD TBD
CPARS	UEI fields are visible on screen; UEI values are visible on screen UEI required for data entry, DUNS no longer accepted	Available TBD TBD
FAPIS	UEI fields are visible on screen UEI values are visible on screen	Available Now TBD
FPDS	UEI fields are visible on screen UEI values are visible on screen UEI in outgoing Atom Feed UEI required for data entry, DUNS no longer accepted UEI required for incoming interfaces	February 13, 2021 February 13, 2021 February 13, 2021 April 4, 2022 April 4, 2022

Figure 8. Defense Logistics Agency. (2021, February 10). [Chart depicting timeline of UEI].

7. Resources

Training reference guides, FAQs, and other pertinent information for reports users can be found at <https://beta.sam.gov/help/library?type=title>

Tutorial videos for learning how to use ad hoc reports in BETA.SAM.gov:

- Introduction to Ad Hoc Reports
- Blank Ad Hoc Reports
- The Report Builder
- Filtering, Drilling, and Sorting

8. Reports

Publicly available static reports can be found on BETA.SAM.gov under the Static Reports Page. A few examples of the types of static reports which can be found include: National Interest Action reports (including the bi-weekly COVID-19 report), the annual Small Business Goaling Reports, and the annual Top 100 Contractor Reports.

III. Summary

1. BETA.SAM

A summary of some of the federal systems and applications are as follows: Contracts Data/Data Bank is the official source for FPDS reports, Contracting Opportunities used to be FBO/FEDBIZ Opps, the Code of Federal Assistance (CFDA), and Wage Determinations. The systems that have not yet transitioned are: Legacy SAM, FAPIIS/CPARS, eSRS/FSRS, and FPDS (data entry).

2. Legacy SAM/UEI

The current DUNS number system will be replaced by the 12-digit Unique Entity Identifier code. Though some registered vendors already have UEI on their profile, the effective date of mandatory transition will occur in April 2022.

It is important to note that PIEE stores all DoD applications, while SAM operates all Federal applications.

Reference

Gerardo, S. (2021, February 10). *BETA.SAM by GSA* [PowerPoint slides: Director's Office DLA Slide Template]. Defense Logistics Agency.

Table of Figures

- A. **Figure 1.** Department Logistics Agency. (2021, February 10). [Diagram depicting BETA.SAM transition].
- B. **Figure 2.** Department Logistics Agency. (2021, February 10). *BETA.SAM.gov legacy site decommission status chart* [Diagram].
- C. **Figure 3.** BETA.SAM.gov. (2021, February 10). [Screenshot from BETA.SAM.gov].
- D. **Figure 4.** BETA.SAM.gov. (2021, February 10). [Screenshot from BETA.SAM.gov].
- E. **Figure 5.** BETA.SAM.gov. (2021, February 10). [Screenshot from BETA.SAM.gov].
- F. **Figure 6.** Defense Logistics Agency. (2021, February 10). [Chart depicting timeline of UEI].
- G. **Figure 7.** Defense Logistics Agency. (2021, February 10). [Chart depicting timeline of UEI].
- H. **Figure 8.** Defense Logistics Agency. (2021, February 10). [Chart depicting timeline of UEI].