System for Award Management (SAM)
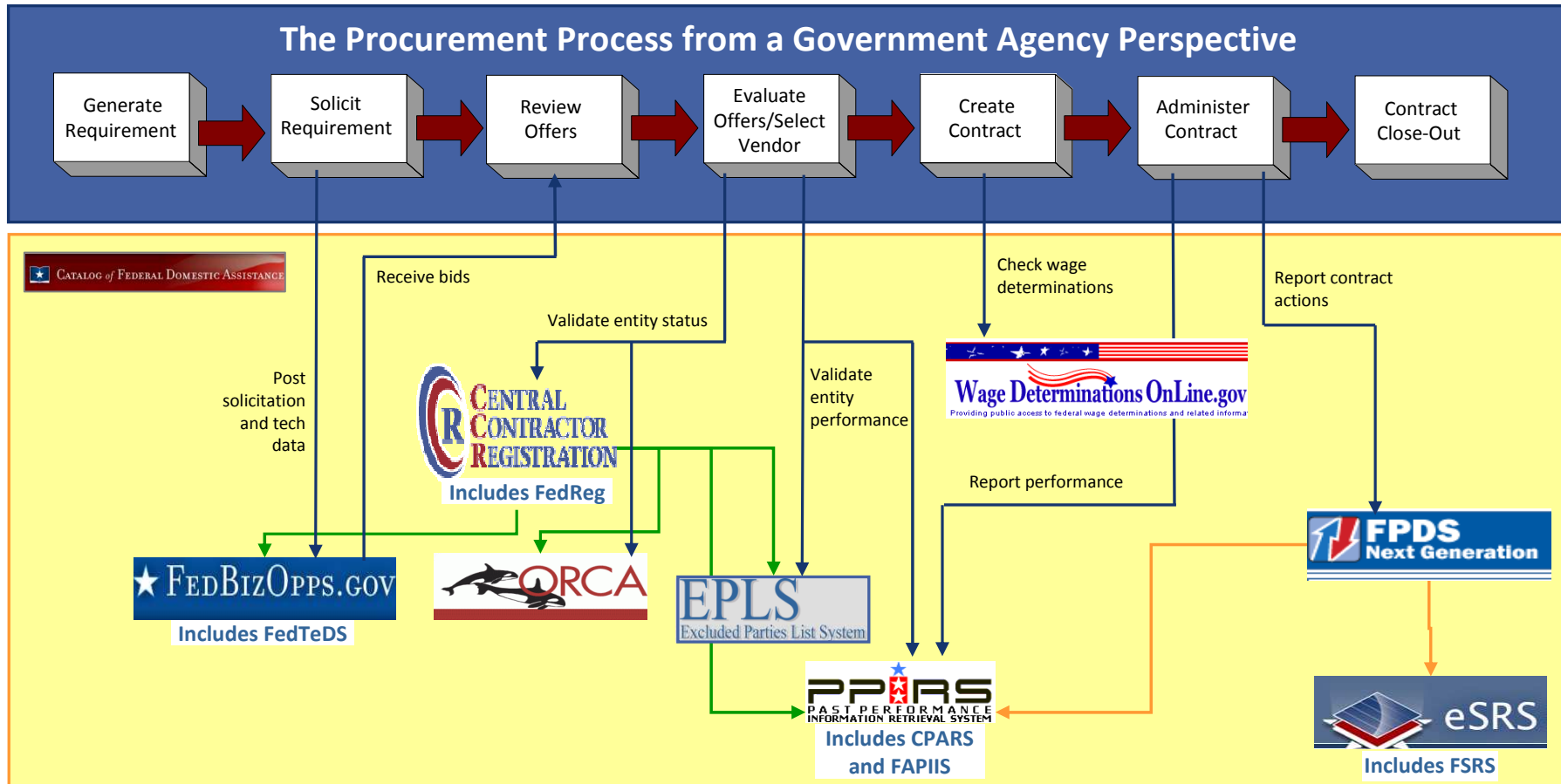
► **Creating Efficiencies through Integration and Consolidation**

February 2012

What's the System Landscape Today?

► Federal/IAE systems support the award process

The Procurement Process from a Government Agency Perspective

Generate Requirement → Solicit Requirement → Review Offers → Evaluate Offers/Select Vendor → Create Contract → Administer Contract → Contract Close-Out

Catalog of Federal Domestic Assistance

Receive bids

Validate entity status

Check wage determinations

Report contract actions

Post solicitation and tech data

Validate entity performance

Central Contractor Registration
Includes FedReg

Wage Determinations OnLine.gov
Providing public access to federal wage determinations and related information

Report performance

★ FedBizOpps.gov
Includes FedTeDS

ORCA

EPLS
Excluded Parties List System

FPDS Next Generation

PPIRS
PAST PERFORMANCE
INFORMATION RETRIEVAL SYSTEM
Includes CPARS and FAPIIS

eSRS
Includes FSRS

→ User action
→ Entity data
→ Contract data

What's Wrong with the Current Approach?

► **Siloed systems**

- **Multiple logins—inefficient and confusing**

- **Data overlap among systems—inefficient and creates opportunity for error**

► **Separate hosting, management, and support**

- **Various standards and service level agreements—may yield varying levels of service**

- **Multiple hosting vendors—more expensive than consolidated hosting**

What Is Our Improvement Approach?

Today

- ► **Siloed** – Separate systems, each with a separate login

- ► **Redundant** – Overlapping data creates opportunity for error and complicates changes

- ► **Separate** – Multiple vendors at many hosting locations, managed separately with varying levels of service

Future

- ► **1 Login!** – Functionality accessible at one online location to streamline the process

- ► **1 Data Source!** – Centralized, normalized data to eliminate potential for conflicting values and improves agility to deal with future changes

- ► **1 Host!** – Consolidated hosting to reduce O&M costs

Existing capabilities, streamlined for efficiency.

How Are We Making the Changes?

► **SAM Requirements and Operations**

- ▪ **IBM is designing and documenting SAM architecture and system requirements and will operate SAM**

► **Phased System Development**

- ▪ **Government will compete the development of each phase and compete subsequent enhancements to SAM to increase competition and opportunities for small and innovative businesses**

► **Federal Service Desk (FSD)**

- ▪ **Current consolidation of Tier 1 help desk services aligns with 1-system approach**

► **Consolidated Hosting Services**

- ▪ **One common database in one hosting location means lower operating costs and greater reporting flexibility**

What Are Benefits to Specific Groups?

► **Contracting/Grants Officers**

- One login provides access to all the information needed to make an award determination
- Streamlined, integrated processes simplify and reduce the time required to complete an award

► **Entities**

- One login provides access to all the tools needed to register, record reps and certs, and view and respond to opportunities
- Streamlined processes decrease the amount of time required to complete a typical registration
- Eliminating artificial information category divisions simplifies data entry

► **System Owners/Administrators**

- Reducing the number of interfaces decreases maintenance challenges and costs

► **All Users**

- Integrating all data into one database increases reporting flexibility

How Will SAM Impact System Interfaces?

Today   **Future**
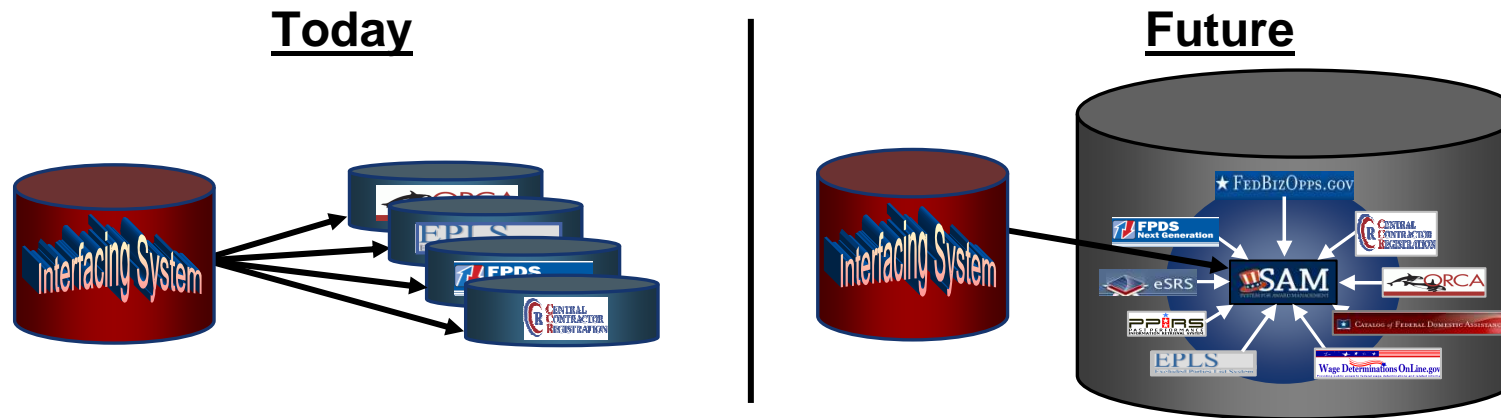
► **Process Improvements** – SAM process-improvement work is identifying ways to reduce the number of interfaces needed

► **1 Database** – As the legacy systems are migrated into SAM, they will be migrating into one database, further consolidating the number of interfaces needed

► **Interface Changes** – Because the data model and interface specifications will change, interfacing systems (contract writing systems, financial systems, business warehouses, grants writing systems, etc.) will need to be modified (see http://sam.gov section on Interfacing Systems)

Your Interfaces Will Change!

How Will the New System Be Organized?

► **IAE system capabilities notionally have been organized around six key functional areas**

Functional Area	Capabilities	Legacy Systems
Entity* Management	• Manage entity core data • Manage certifications/representations	• CCR/FedReg – Central Contractor Registration/Federal Agency Registration • ORCA – Online Representations and Certifications Application
Award Management	• Post solicitation and award data • Maintain government-wide contract award data • Manage government-wide subcontractor data	• FBO – Federal Business Opportunities • FPDS-NG – Federal Procurement Data System-Next Generation • eSRS/FSRS – Electronic Subcontracting Reporting System/FFATA Subaward Reporting System
Wage Data	• Access wage determinations	• WDOL – Wage Determinations Online
Performance Information	• Manage/maintain past performance information • Manage exclusion list	• PPIRS/CPARS/FAPIIS – Past Performance Information Retrieval System • EPLS – Excluded Parties List System
Assistance Program Catalog	• Create/maintain assistance program catalog	• CFDA – Catalog of Federal Domestic Assistance
Support	• Provide security/access control • Provide reporting/communications support • Provide internal controls	

* For the purposes of this capability area, *Entity* refers to prime contractors, organizations or individuals applying for assistance awards, those receiving loans, sole proprietors, corporations, partnerships, and any Federal government agencies desiring to do business with the government
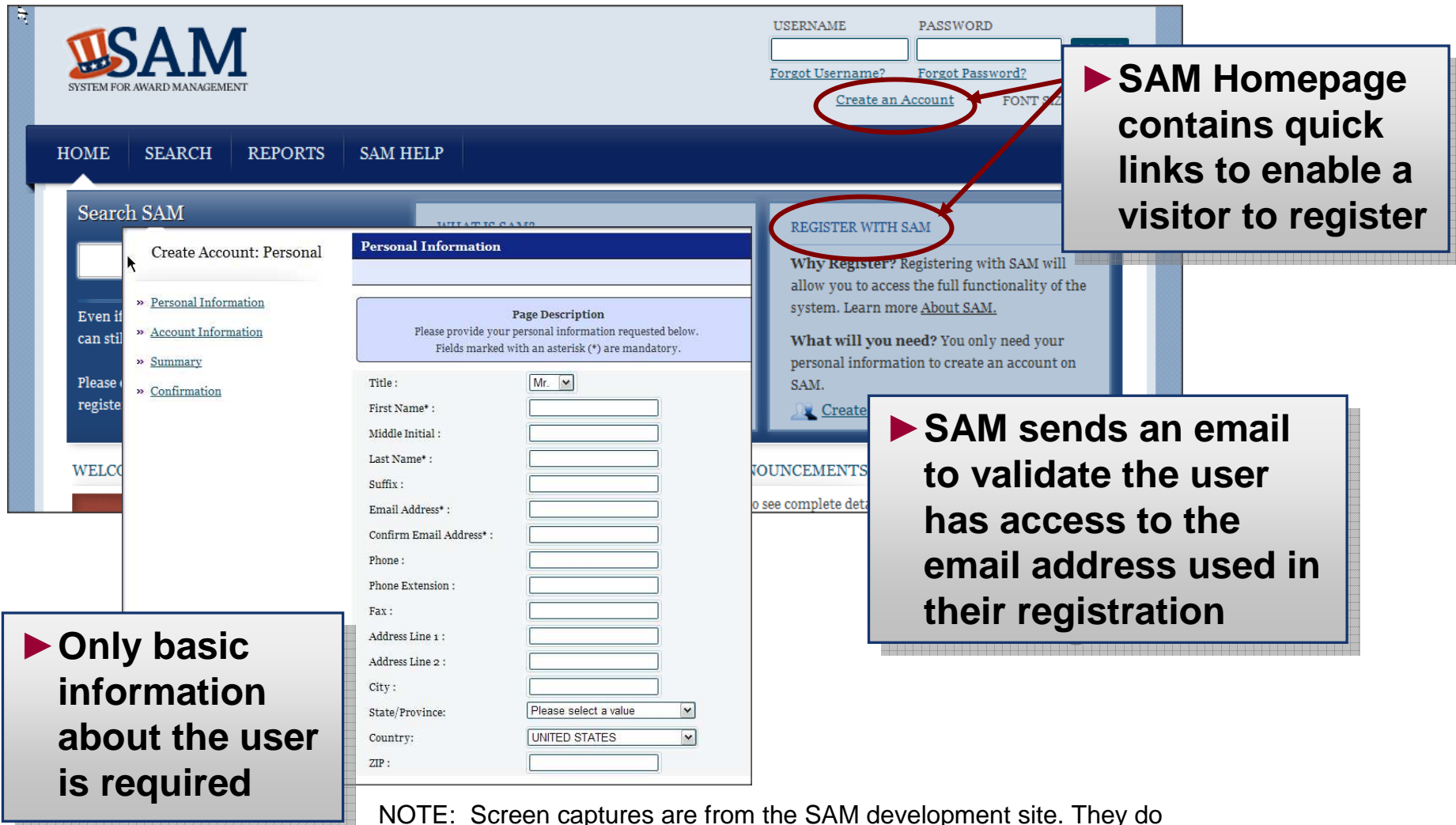
What Do I Need to Know about SAM Access?

► **SAM accounts are created for a person, not an entity**

► **Upon creating a SAM account, a user is considered an "authenticated user"**

► **Authenticated users can be associated with one or more federal or non-federal entities, but not both**

► **Admin approval is required when requesting roles**

► **Existing roles will be migrated to SAM**

► **A user can disassociate from entities and keep his SAM account**

► **The User Management process begins on the home page**

► **SAM Homepage contains quick links to enable a visitor to register**

► **SAM sends an email to validate the user has access to the email address used in their registration**

► **Only basic information about the user is required**
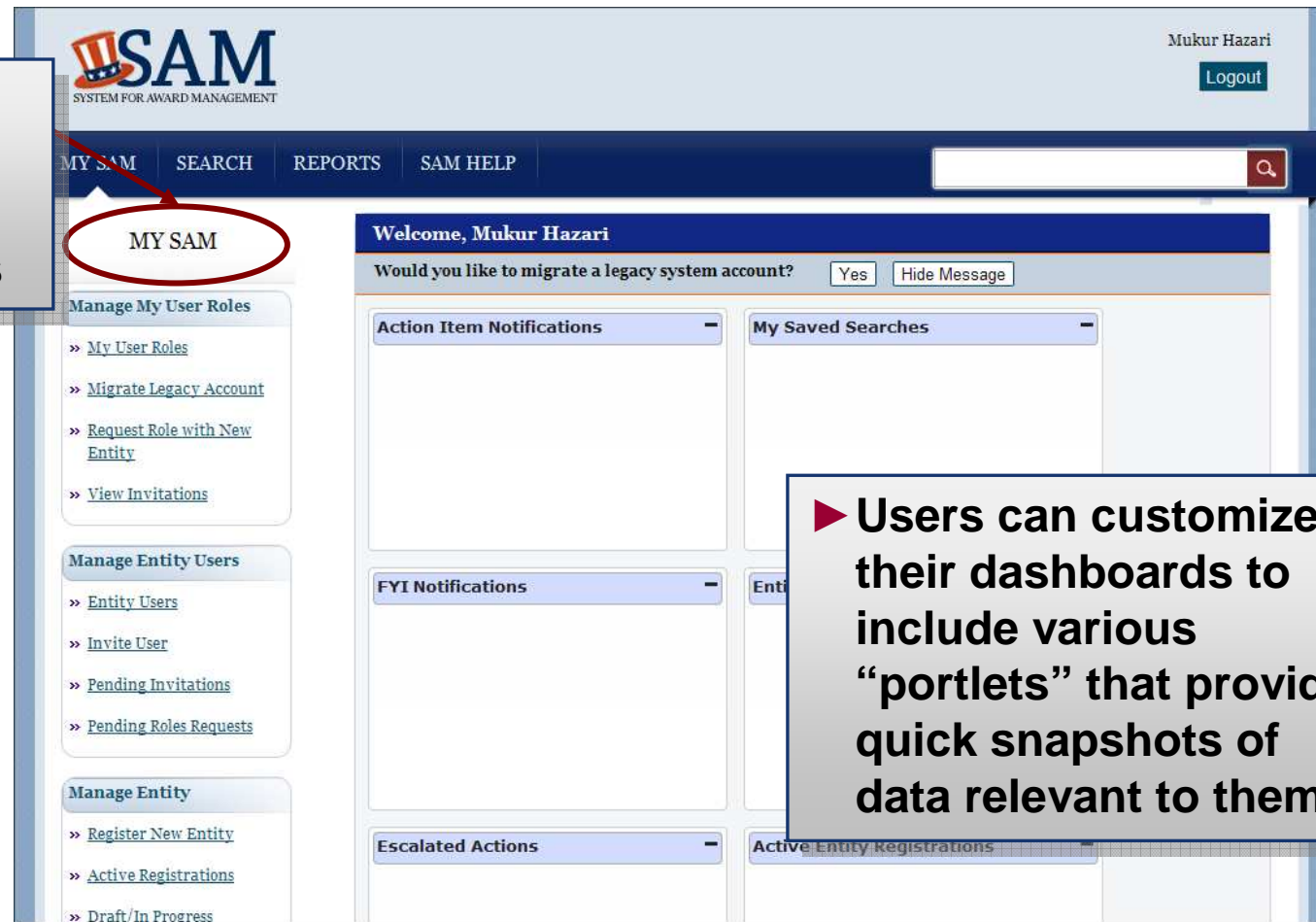
NOTE: Screen captures are from the SAM development site. They do not represent the final product and are considered work in progress.

SAM Access: User Dashboard

► **When a user logs in, the first page they see will be their SAM Dashboard**

► **The available menu options differ based on the user's roles**

► **Users can customize their dashboards to include various "portlets" that provide quick snapshots of data relevant to them**

NOTE: Screen captures are from the SAM development site. They do not represent the final product and are considered work in progress.

► **"Public users" by definition do not have a SAM account; they may perform a search at any time for data deemed "Public"**

► **The Search feature in SAM is a full text search, which allows the user to enter any criteria to search by**

► **Upon performing a search, the user can use the filter to narrow down the results**

► **Authenticated users have the ability to save their search queries**

► **Any user can save or print the results of a search**

► **Search results will be displayed differently depending on the functional area of the returned results**

► **Initial displayed results are at a summary level, and a link to the complete record is provided**

SAM SYSTEM FOR AWARD MANAGEMENT

► **SAM provides tools to help users find, view, and review data**

Search Results

You can refine your search by entring new seach criteria in the search box and using the Se... use the Clear Search button. Using the Save Search Query button will allow you to run this s...

► **Users can clear and refine search criteria**

► **SAM includes filtering and sorting functions**

lockheed   [Search] [Clear]

Sort by Relevance ▾ Order Descending ▾

FILTER RESULTS

Your search for "lockheed" returned following results ...

► **SAM displays the searched terms**

By Record Status

☑ Active

☐ Inactive

Name: LOCKHEED MARTIN CORPORATION

DUNS: 456756766   ⊞

DUNS: 456756768

By Functional Area

☐ Entity Management

☐ Performance Information

► **SAM provides options for future viewing of the data**

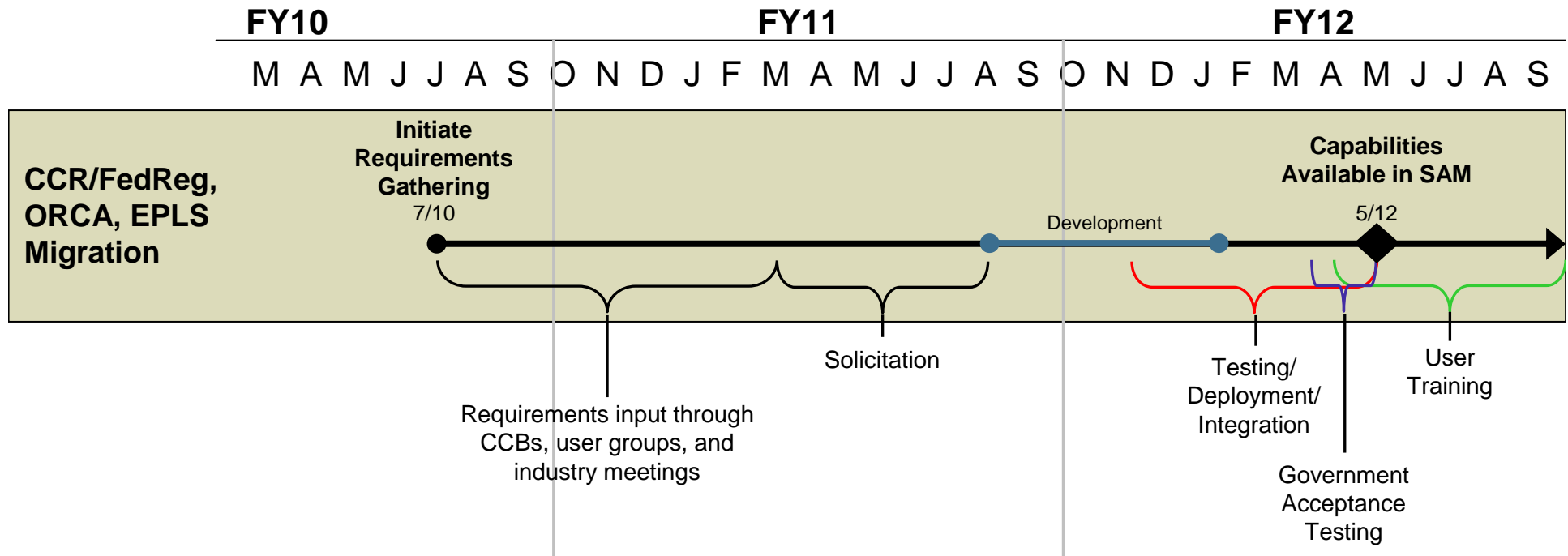Showing page 1 of 1   SAVE SEARCH | SAVE PDF | EXPORT RESULTS | PRINT

NOTE: Screen captures are from the SAM development site. They do not represent the final product and are considered work in progress.

► **Acceptance Testing will begin in late March**

► **Training will be available online in early May**

► **SAM Phase 1 will be available to users in late May 2012**

| FY10 | FY11 | FY12 |

CCR/FedReg, ORCA, EPLS Migration

Initiate Requirements Gathering 7/10

Development

Capabilities Available in SAM 5/12

Solicitation

Requirements input through CCBs, user groups, and industry meetings

Testing/ Deployment/ Integration

Government Acceptance Testing

User Training

► **Subsequent migration groups will follow this same pattern**

What Can You Expect in May 2012?

► **After migration, all the capabilities in CCR/FedReg, ORCA, and EPLS will be available at SAM.gov – 1 login!**

► **Users will be automatically redirected from the legacy systems to SAM**

► **Users will specify a user ID and password (can be the same as the one you use now) – the system will guide users through the process**

  ▪ **Existing CCR/FedReg, ORCA and EPLS data will be moved to SAM**

  ▪ **The process of logging in will connect you with the data you have permission to view now**

  ▪ **Publicly available data will still be publicly available**

► **Registering entities will experience a streamlined process**

  ▪ **Data and process will be integrated into logical groupings (e.g., Core Data, Representations and Certifications)**

  ▪ **Registration purpose will be captured at the start to guide data entry**

  ▪ **Process steps will be reordered to improve efficiency (e.g., TIN match, CAGE validation, POC collection)**

What Should I Do Now?

► **Review SAM information on http://sam.gov**

► **Direct any SAM-related questions to AskSAM@gsa.gov**

► **For interfacing systems**

- **Use the interface specification and other information available at http://sam.gov**

- **Ask to be added to the interfaces distribution list by writing to AskSAM@gsa.gov**

► **Plan to review SAM training materials when available online beginning in early May**

► **Review your organization's CCR/FedReg and EPLS administrators and users to verify access requirements and/or roles**