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MARCH 1-3,
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Future of CCR, ORCA, and EPLS – SAM Entity Management



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What Is SAM?

Today

- **Siloed** – Separate systems each with a separate login
- **Redundant** – Overlapping data
- **Separate** – Various hosting locations, managed separately



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



Existing capabilities, streamlined for efficiency



How Will SAM Be Organized?

Functional Area	Capabilities	Legacy Systems
Entity* Management	<ul style="list-style-type: none"> Manage entity core data Manage certifications/representations 	<ul style="list-style-type: none"> CCR – Central Contractor Registration (will include FedReg) ORCA – Online Representations and Certifications Application
Award Management	<ul style="list-style-type: none"> Post solicitation and award data Maintain government-wide contract award data Manage government-wide subcontractor data 	<ul style="list-style-type: none"> FBO – Federal Business Opportunities FPDS-NG – Federal Procurement Data System-Next Generation eSRS – Electronic Subcontracting Reporting System (will include FSRS)
Wage Data	<ul style="list-style-type: none"> Access wage determinations 	<ul style="list-style-type: none"> WDOL – Wage Determination Online
Performance Information	<ul style="list-style-type: none"> Manage/maintain past performance information Manage exclusion list 	<ul style="list-style-type: none"> PPIRS – Past Performance Information Retrieval System EPLS – Excluded Parties List System
Assistance Program Catalog	<ul style="list-style-type: none"> Create/maintain assistance program catalog 	<ul style="list-style-type: none"> CFDA – Catalog of Federal Domestic Assistance
Support	<ul style="list-style-type: none"> 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's Changing When?

- Legacy system capabilities will move to SAM in phases

Phase	Functional Area	System	Timeframe
1	Entity Management and the Exclusions Portion of Performance Information	CCR/FedReg, ORCA, EPLS	1 st half of 2012
2	Award Management and Assistance Program Catalog	FBO, eSRS/ FSRS, CFDA	2013
3	Wage Data	WDOL	2013
4	Award Management	FPDS	2014
5	Performance Information	PPIRS	TBD



How Will Phase 1 Change My Life?

- New URL and Login for CCR/FedReg, ORCA, and EPLS
- Entity Management Process Improvements
- Performance Information/Exclusions Process Improvements
- Interface Changes



New URL and Login

- After migration, all the capabilities will be available at SAM.gov – 1 login!
- A new user ID and password will be required
 - User ID/Profile migration
 - User ID and profile will be mapped from the legacy systems
 - User profiles will be linked to roles and permissions
 - Role-based access
 - Roles and permissions will determine “level” of access
 - These will be mapped to the new roles from the legacy systems



Process Improvements – Entity Management

- Integrates CCR/FedReg and ORCA information, divides data entry into logical groupings:
 - Core data (e.g., Name and address, org type, financial information)
 - Assertions (e.g., NAICS, size metrics) and conditional/optional information
 - Reps and certs (FAR questionnaire)
- Captures registration purpose to streamline and limit data entry to required information



Process Improvements – Entity Management (cont'd)

- Integrates small business certifications into the registration process and uses assertions to make small business determinations
- Aligns CCR/FedReg and ORCA update dates



Process Improvements – Entity Management (cont'd)

- Puts TIN at beginning (after DUNS) to allow time for match
- Moves POC collection to the end of the process and bases it on data entered during the registration
- No longer populates the Taxpayer Name with the Legal Business name
- Moves CAGE validation/assignment
 - If the entity already has a CAGE code it will be validated up front in the process
 - If the entity does not have a CAGE code prior to registration one will not be assigned until the TIN has been validated



Process Improvements – Exclusions

- Updates and clarifies names
 - Role – “Debar User” is now “Agency Exclusion Representative”
 - Classification – “Entity” is now “Special Entity Designation”
- Makes all four classifications available to all agencies
 - Firm
 - Individual
 - Vessel
 - Special Entity Designation



Process Improvements – Exclusions (cont'd)

- Creates a Manage Exclusions tab for easy access to exclusions you have created
- Establishes a SAM ID as a unique ID for every record and as a replacement for the Temporary DUNS
- Increases ability to see associated firms through automatic check for more locations
- Treats new locations as separate, cross-referenced records to increase data quality and organization within the system

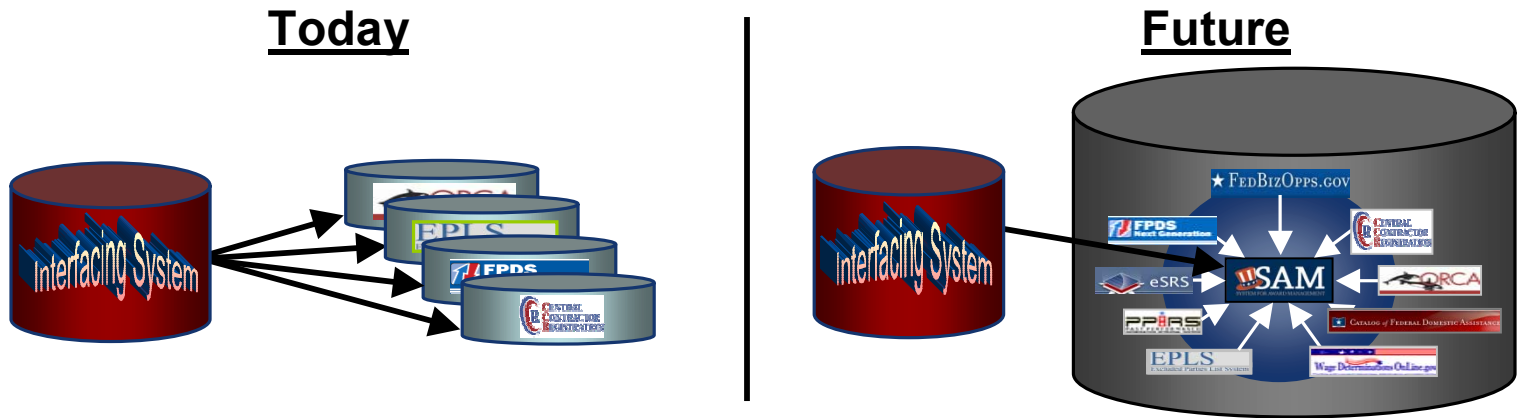


Process Improvements – Exclusions (cont'd)

- Improves communication about D&B investigations
 - Distributes email when investigation is complete
 - Performs investigations on both Firms and Special Entity Designations
 - Distributes D&B Business Investigation Report
 - Adds system prompt to adjudicate Classification if improperly classified
- Improves use of D&B monitoring
 - User will be prompted to update record information when available
 - System will NOT make automatic adjustments to a record



How Will SAM Impact Interfaces?

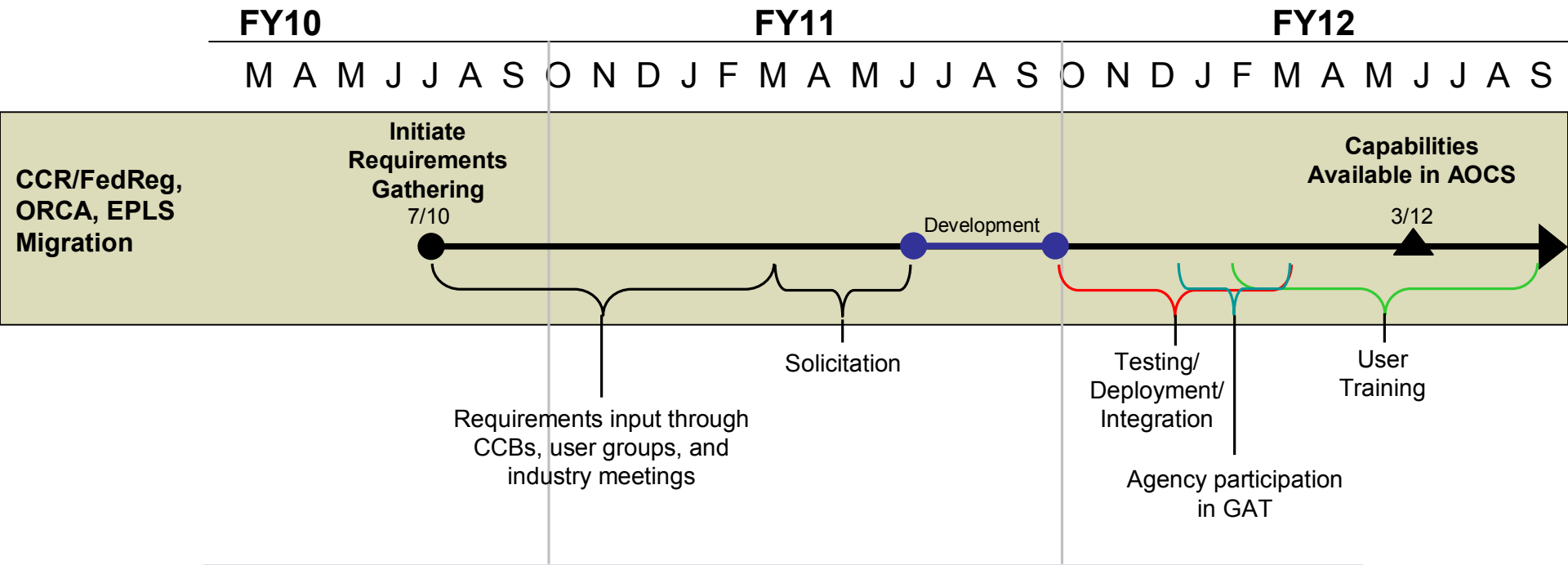


- Process Improvements – SAM process-improvement work is identifying ways to reduce the number of interfaces needed
- 1 Database – As the legacy systems are migrated into SAM, they will be migrating into one database, further reducing the number of interfaces needed

Your Interfaces Will Change!



What's Next



- Subsequent migration groups will follow this same pattern.