Learning Objectives

• Know the different systems Beta.Sam has, and will, include
• Use Beta.Sam for basic searches of different types of data
• Sign in and manage your data and searches
• Best practices for search and opportunities
Government Contracting is Big Business

CY 2019 Contract Dollars to Ohio PTAC Clients

$942,996,298

$87,046,636

$27,152,260

$1,092,945

$1B+ in prime & subcontracts!
What is this site?

The General Services Administration (GSA) manages federal acquisition and awards processes in 10 online websites which are now being merged into one.

This site will become the official U.S. government website for people who make, receive, and manage federal awards.

We are bringing all data over from the original websites, including entity registrations and historical contract data. This means your entity registration will automatically transition here when the original SAM.gov is retired.

https://beta.sam.gov/cm/videos/detail?id=231
Get Ready

- Keep your legacy system passwords up to date. If you haven’t accessed your account(s) in a while, sign in to make sure your account is still active. Passwords generally expire in 90 days.
- Monitor the legacy systems for transition updates
- Remain in contact with your agency’s CCB representative (federal users)
- Join the Integrated Award Environment (IAE) Industry Community on Interact (non-federal users)
- Attend quarterly Industry Days (announced on interact) for updates on modernization
Contract Opportunities (FBO)

Sign in to save searches and look at your data

Search different data types from different systems that have been integrated with Beta.Sam
Double authentication is required through text, call, email, or browser.
Downloads are saved download links from the last 7 days.

Saved searches can be re-run when you log in. And following opportunities allows you to stay up to date on any changes.
You can duplicate your searches to slightly modify them
Set your notification schedule
And download search results
Click on the drop down to reveal an area to search small business events...

Include multiple keywords to narrow down the results

Save your search (can save multiple) to easily rerun it in the future. You will also receive emails when the records change or are updated.
Click on the drop down to reveal an area to search small business events...

Not very useful....

Instead Search for “Small Business Webinars” and select “Special Notices” from the Type of Notice criteria.....
Search Box in Beta.Sam

• Use the Search Box to search based off of:
  • Solicitation Number
  • Keyword(s)
    • Industry Related
    • Technical
  • Key Phrase(s) use - “Key Phrase” “Key Phrases”
  • Set dates filters with open to end i.e. Response Date: Next Week to “open”
Use the “Change Filters” button to customize your search filters, adding criteria such as “Place of Performance State” and....
Just Some of the Additional Search Criteria in Beta.Sam

- **Data Types**
  - All Award Data
  - Assistance Listings
  - Contract Opportunities
  - Contract Data
  - Entity Information
  - Federal Hierarchy
  - Wage Determinations

- **Dates**
  - Inactive Date
  - Published Date
  - Updated Date
  - Response Date/Offers Due

- **Federal Organization**
  - Air Force is Sub Tier code 5700

- **Type of Notice**

- **Classifications**
  - NAICS
  - PSC
  - Set Asides

- **Place of Performance**
  - Zip Code
  - State (one at a time)
Follow an opportunity to receive updates when the opportunity has any changes.

Note the different Types of information categories listed.

Marketing Branding Services

Contract Opportunity

- General Information
- Classification
- Description
- Attachments/Links
- Contact Information
- History

Interested Vendors List
Utilize the Interested Vendors list to reach out to other interested parties for teaming or post your company as an interested vendor.

Make sure to check the set aside, NAICS, and other contractual data before considering the opportunity.

You can view changes made during the solicitation process.

This is a Sources Sought Notice Only. The U.S. Army U.S. Army Warrior Care and Transition is seeking a Contractor to provide Consult Services to support DCS, WCT Strategic Communications Plan. The anticipated requirement will be a competitive direct award to an SBA 8(a) Program participant, provided two or more qualified SBA 8(a) businesses respond to this sources sought synopsis with
General Information

- Contract Opportunity Type
- Updated Published Date
- Original Published Date
- Updated Response Date
- Original Response Date
- Inactive Policy
- Updated Inactive Date
- Original Inactive Date

Classification

- Original Set Aside
- Product Service Code
- NAICS Code
- Place of Performance
Description

This is a general description of the program and project.

Attached are the entire Sources Sought Notice with submittal instructions; draft Performance Work Statement (PWS); Performance Requirements Summary (PRS) and Technical Exhibits with workload data.

Some files may be restricted.
Your Primary POC for the opportunity.

Note: When a solicitation is released you only refer questions to the Contracting Officer or Primary POC, and preferably during the stated Q&A period. Discussing the opportunity with anyone else related to the program can result in Disqualification from bidding!
Best Practices

• Gather your information beforehand
  • Know your NAICS and PSC Codes, Set Asides, and Keywords
• Utilize your resources
  • https://beta.sam.gov/help/new-to-sam
  • https://beta.sam.gov/help/contract-opportunities
  • https://interact.gsa.gov/group/integrated-award-environment
• Target Sources Sought and Presolicitations First
• Share your feedback with Beta.Sam through the “Provide Feedback” links
  • Be specific, and respectful
• Contact your local PTAC Representative!
Upcoming Improvements

Additional Planned Improvements

• There will be several enhancements coming to Contract Opportunities in beta.SAM.gov in the future. Some of these include:
  • Users can schedule future searches
  • Option for filtering federal organization below sub-tier
  • Improved geographic search capabilities (e.g., being able to search multiple states in a single search)

Contract Data (FPDS) – FPDS Fully Retired October 17th

Contract Data Reports

Static Reports
- Top 100 Contractors
- Small Business Goals

Standard Reports
- 30+ Standard Reports
  - Includes Award by Contractor Type, Acquisition Vehicle Activity, Contract Detail, Contractor Search, etc.
- Ad-Hoc Reports
  - Should have advanced knowledge to use
- Admin Reports
The Migration of FPDS

• For users who created and ran ad hoc reports in FPDS.gov before January 31, 2020, we converted these reports and made them available in beta.SAM.gov. You can access converted reports in your beta.SAM.gov account.

• If you created ad hoc reports in FPDS after January 31, 2020, those reports have not been converted and will have to be recreated in beta.SAM.gov
### Ad Hoc Reporting

#### INDEX

<table>
<thead>
<tr>
<th>Summary of your selections</th>
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<tr>
<td>1. Start Date for Date Signed</td>
</tr>
<tr>
<td>2. End Date for Date Signed</td>
</tr>
<tr>
<td>3. Start Date for Last Modified Date</td>
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<tr>
<td>4. End Date for Last Modified Date</td>
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<tr>
<td>5. Choose the attributes of the report</td>
</tr>
<tr>
<td>6. Choose the metrics of the report</td>
</tr>
<tr>
<td>7. Qualify on any attribute</td>
</tr>
<tr>
<td>8. Metric qualification</td>
</tr>
</tbody>
</table>

| 1. Start Date for Date Signed | (Required) |
|------------------------------|
| Please Enter a Start Date for Date Signed |
| This prompt requires a value between 7/23/2008 and 7/23/2020. |
| 1/1/2019 |  |

| 2. End Date for Date Signed | (Required) |
|------------------------------|
| Please Enter an End Date for Date Signed |
| This prompt requires a value between 1/1/2019 and 1/1/2031. |
| 7/23/2020 |  |

<table>
<thead>
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<th>3. Start Date for Last Modified Date</th>
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<tr>
<td>Please Enter a Start Date for Last Modified Date</td>
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<tr>
<th>4. End Date for Last Modified Date</th>
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<tr>
<td>Please Enter an End Date for Last Modified Date</td>
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<tr>
<td>[ ]</td>
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</tbody>
</table>

| 5. Choose the attributes of the report | (Required) |
|----------------------------------------|
| Select the attributes to include on your report: |
| This prompt requires at least one selection. |
| Look in: |
| [ ] search results: |
| Search for: |
| [ ] Search for: |
| [ ] Select: |
| Available: |  |

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**OHIO UNIVERSITY PROCUREMENT TECHNICAL ASSISTANCE CENTER (PTAC)**
Best Practices

• Gather your information beforehand
  • Know your NAICS and PSC Codes, Set Asides, Competition, and Keywords

• Utilize your resources
  • https://beta.sam.gov/help/new-to-sam
  • https://beta.sam.gov/help/contract-data
  • https://beta.sam.gov/help/library?q=report&types=3 (Reports Training Videos)

• Sign in to save your searches and download data

• Share your feedback with Beta.Sam through the “Provide Feedback” links
  • Be specific, and respectful

• Contact your local PTAC Representative!
Questions?

Billy Grill
Dayton, OH PTAC Counselor
bgrill@ohio.edu
Office: (937) 230-9896
https://ptac.ohio.edu/
Next Steps & Request Presentation

If you would like more assistance:
Email me or your local PTAC Counselor to discuss how we can help your business navigate marketing to the Federal, State, and Local Government

https://www.aptac-us.org/find-a-ptac/