



## Preparing for the FBO Transition to beta.SAM.gov

This quick start guide is to assist **Federal users of FBO.gov** with their transition to beta.SAM.gov. This document is one in a series of three, and addresses the transition from an overview perspective, with information on how to prepare for the upcoming changes.

### Why is FBO.gov going away?

FBO.gov, along with all other government wide acquisition systems managed by the Integrated Award Environment (IAE) is being modernized and consolidated. This will provide not only better security, data quality, and convenience for users, but will also reduce barriers for doing business with the government, reduce reporting burden, and increase transparency into federal spending.

### What is beta.SAM.gov?

#### User Video:

<https://beta.sam.gov/cm/videos/detail?id=135>

beta.SAM.gov is the name of the new, modernized system. Even though it says “beta”, it is currently authoritative for Assistance Listings and Wage Determinations. In November 2019, it will become authoritative for Opportunities as well. Once the current SAM.gov is migrated, we will drop the “beta” and just be “SAM.gov”.

### What do I have to do to get ready for FBO.gov decommissioning?

Follow the steps provided to ensure that your transition experience will be as seamless as possible.

#### Step 1: Confirm what you have today in FBO.gov

There are several things you want to look at and make a note of in FBO.gov now so that you do not lose any information during the transition.

- What is my role(s)/permissions in FBO.gov?
- What is my FBO.gov UserName and Password?
- What Office(s) am I associated with in FBO?
- What notices am I watching?
- What do I have in my Search Agent?
- Finally, be sure to reset (and remember) your FBO.gov password after August 12, 2019, so that you can migrate your FBO.gov role to beta.SAM.gov.

#### Step 2: Create your beta.SAM.gov account (using login.gov)

You do not need to wait until the transition in November- you can, and should, do these steps now.

1. Go to beta.SAM.gov
2. Select “Sign In” from the upper right corner, at which point you will be redirected to a login.gov prompt
3. Follow the instructions on the screen

Users may choose to use the video walkthrough of sign up/sign in to ensure that each step is done correctly - If you chose to, you can access it here: <https://beta.sam.gov/cm/videos/detail?id=231> Additional information (FAQs, etc) is available in the Learning Center on beta.SAM.gov, and on the login Quick Start Guide.

**User Video:**

<https://beta.sam.gov/cm/videos/detail?id=231>

**Step 3: Migrate Your Role, or Request a Role**

The third step is to either migrate your role or request one, approximately 4-6 weeks before FBO.gov is decommissioned. Attempts made to migrate before that time will fail. Roles can be requested or assigned at any time.

After you have created your user profile, you will be given the ability to request a role. If you have an active account in FBO.gov and the migration period is open, you may skip this step and choose to migrate instead.

**To request a role:**

If for any reason you cannot migrate your FBO.gov account, need a different role or don't have a legacy account, then you will need to request your role to edit or publish Opportunity notices for your Agency.

The Role Request form can be accessed either during the account creation process or by going to your **Profile**, then selecting **My Roles** from the left menu.

Fill out the form. The Supervisor field is required for informational purposes only. This enables the Opportunities Administrator, who approves or rejects the role request for your Agency, to have a point of contact within your office if additional information is needed. Use the Agency picker to select your office, then select your role and domain.

To align the 10 legacy systems into one beta.SAM Role Management, there have been updates to the role names. The base role functions remain true, so a Contracting officer (was Buyer) can post notices.



Submit the request, and it will be sent to the Agency Administrator for opportunities to be either approved or rejected.

**To Migrate a role:**

Role Migration can be accessed either during the account creation process, from the “**Go to my role**” link in your workspace, or by going to your **Profile**, then selecting **Migrate Roles** from the left menu.

To migrate a role, select FBO.gov from the dropdown menu, then enter your FBO.gov login and password, then select Migrate. You should see a notice pop up that the migration was successful, and when you go to My Roles, you should now see your role in the table.

It is also important to note that some roles will have different names in beta.SAM.gov than they did in their legacy system, so users migrating their roles may notice a change in their role name. For example, users migrating roles will notice that the FBO roles of ‘Buyer’ and ‘Limited Buyer’ have been renamed ‘Contracting Officer’ and ‘Contracting Specialist’, respectively, within beta.SAM.gov. Please refer to the table above to see what FBO roles will be in beta.SAM.gov.

**Role Migration/Request User Video:**

<https://beta.sam.gov/cm/videos/detail?id=186>

**Step 4: Check out your Workspace**

Before launch, your beta.SAM.gov workspace will have your profile, view of your Federal Hierarchy, and management of following, and saved searches. At launch, your beta.SAM.gov workspace will additionally include a widget allowing you to access Contract Opportunities. You are now prepared to begin working on your notices.

---

**Additional Information and Resources**

If you are not the Federal Hierarchy Administrator you will need to reach out to your corresponding Federal Hierarchy Administrator. That information can be found by emailing [newsamtesting@gsa.gov](mailto:newsamtesting@gsa.gov). Additionally, if you need to deal with questions regarding your Administrator Role email [newsamtesting@gsa.gov](mailto:newsamtesting@gsa.gov).