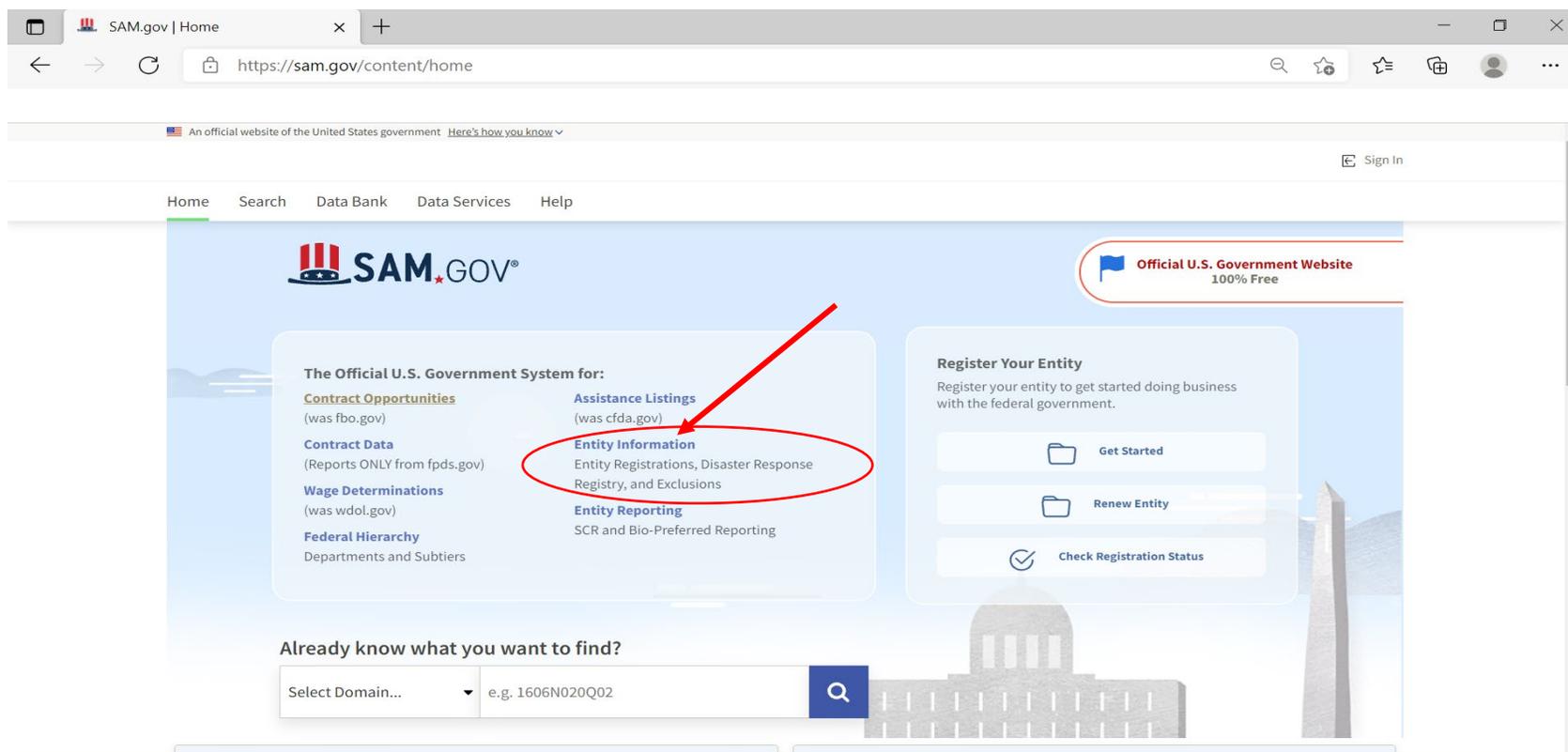


How to Complete System for Award Management (SAM) Monthly Staff Exclusion Checks

***Before you begin this process, please note the following:**

- You are not required to establish a SAM user account to complete monthly staff exclusion checks.**
- The SAM website is subject to change at any time, if you have any questions in addition to these instructions, please do not hesitate to contact SAM directly by clicking here [SAM.gov | Contact](#) and they will assist you.**

1. Access the www.sam.gov webpage, then select **Entity Information**.



2. Select **Advanced Search**.

The screenshot shows the SAM.gov Exclusions page. At the top, the browser address bar displays "https://sam.gov/content/exclusions". The page header includes the SAM.GOV logo and a "Sign In" link. A navigation menu contains "Home", "Search", "Data Bank", "Data Services", and "Help".

The main content area is titled "Exclusions" and includes a descriptive paragraph: "An exclusion record identifies parties excluded from receiving Federal contracts, certain subcontracts, and certain types of Federal financial and non Financial assistance and benefits. Exclusions are also referred to as suspensions and debarments."

Below this is the "Search Exclusions" section, which features a search input field containing "e.g. Smith, 123456789" and a search button. A red arrow points from the "Advanced Search" link in the "Search Exclusions" section to the "Advanced Search" link in the "Federal Users" section. The "Federal Users" section contains two buttons: "Sign in to get started" and "Go to Exclusions Federal home".

Below the search section are two expandable cards: "Get started searching exclusions" and "Use exclusions advanced search".

At the bottom, there are four resource boxes: "Exclusions Resources" (Types of exclusions), "Download Data Files" (Downloading exclusions files), "Connect to Data Services" (How to use data services), and "Help" (Frequently Asked Questions).

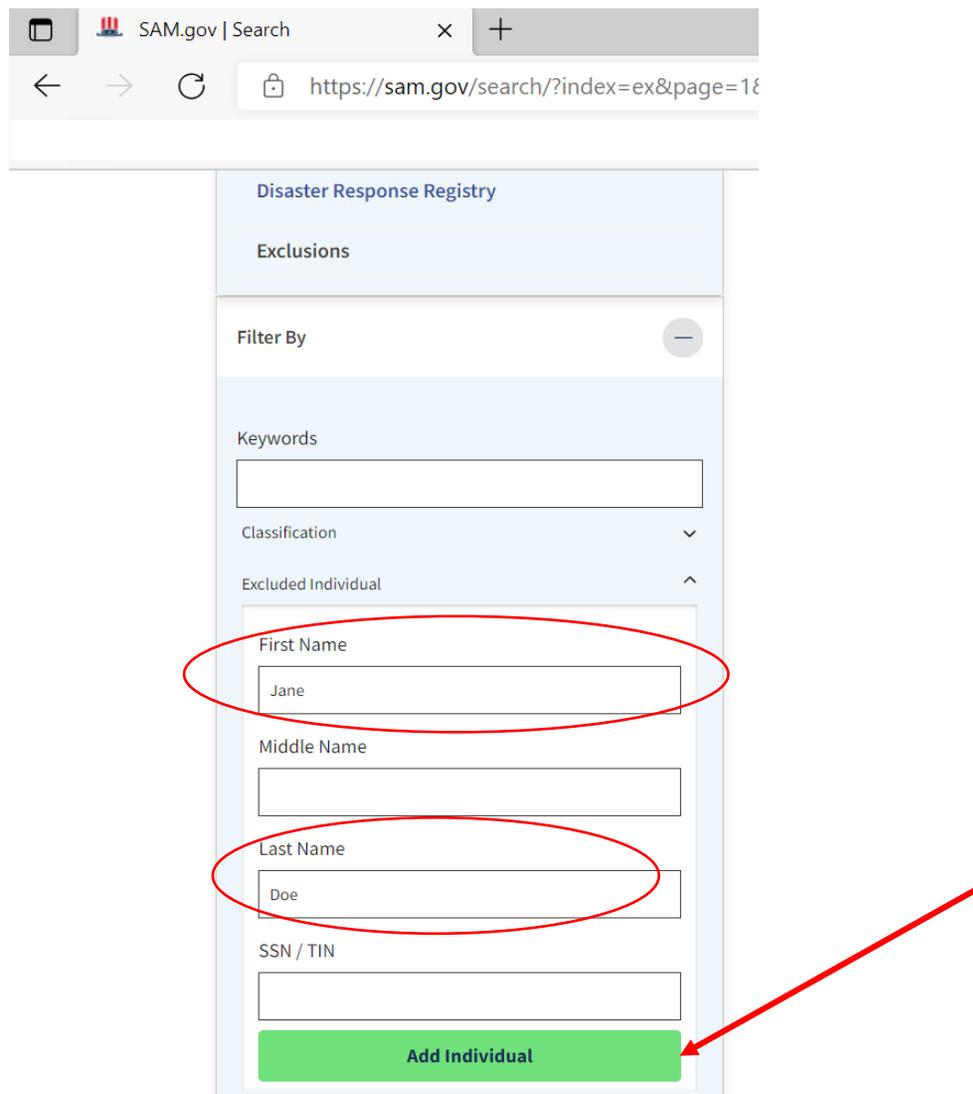
3. Select Exclusions.

The screenshot shows the SAM.gov search page. At the top, there is a browser window with the URL `https://sam.gov/search/?index=ei&pageSize=25&page=1&sort=-relevance`. Below the browser, the SAM.gov logo is visible, along with a navigation menu containing 'Home', 'Search', 'Data Bank', 'Data Services', and 'Help'. A search bar contains the text 'e.g. 1606N020Q02'. A red-bordered box highlights a sign-in prompt that reads: 'Please Sign In: You must sign in to your SAM.gov account to search Entity Registrations or the Disaster Response Registry.' A green 'Sign In' button is located to the right of this message. On the left side, there is a sidebar menu titled 'Select Domain Entity Information' with a plus sign. The menu items are 'All Entity Information', 'Entity Registrations', 'Disaster Response Registry', and 'Exclusions'. The 'Exclusions' item is circled in red, and a red arrow points to it from the right. Below the menu items is a 'Filter By' section with a minus sign. To the right of the sidebar, there is a 'Select Criteria' panel with a left-pointing arrow icon and the text 'Choose your filters and run your report to begin.'

4. Select the drop-down menu for **Excluded Individual**.

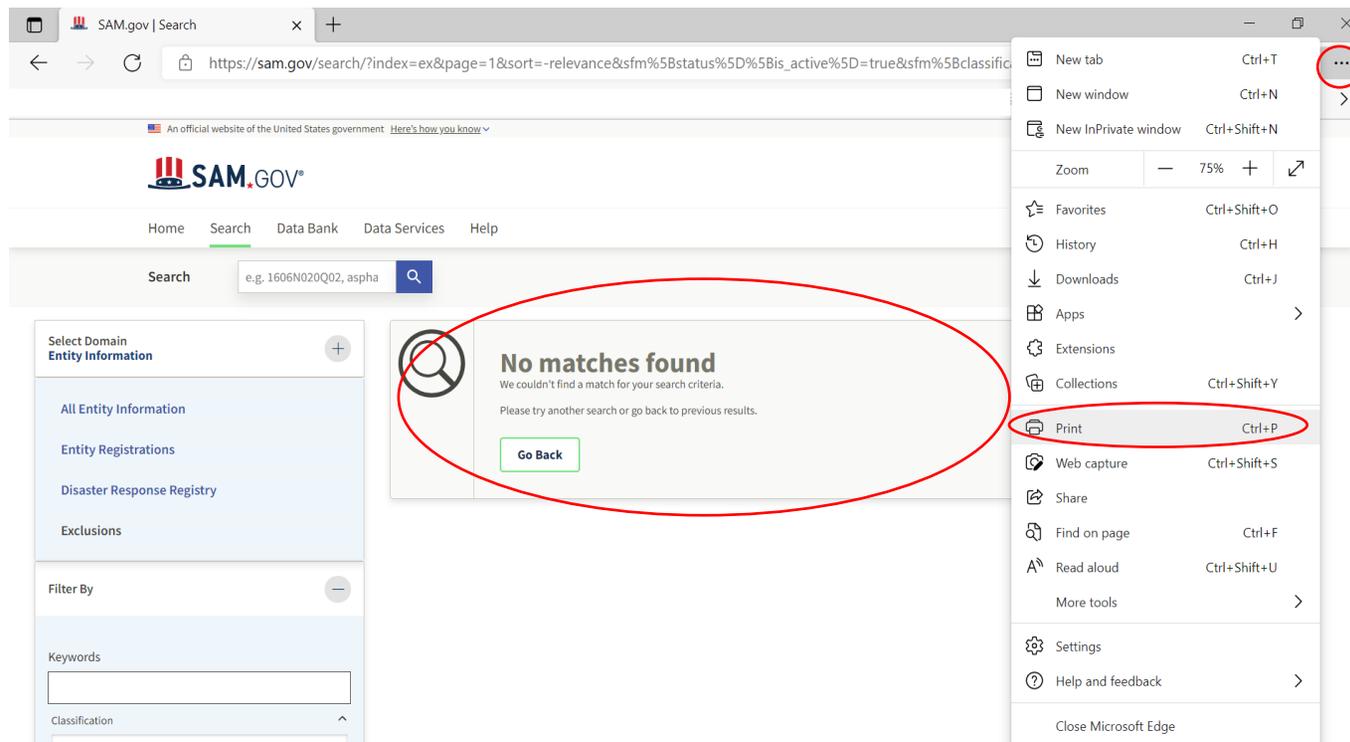
The screenshot shows a web browser window with the URL <https://sam.gov/search/?index=ex&page=1&pageSize=25&sort=-relevance>. The page is titled "Select Criteria" and includes a sub-header "Choose your filters and run your report to begin." On the left side, there are two main sections: "Select Domain Entity Information" and "Filter By". The "Filter By" section contains several dropdown menus. The "Classification" dropdown menu is currently open, and the option "Excluded Individual" is selected and circled in red. A red arrow points from the "Excluded Individual" option to the "Select Criteria" header. Other options in the "Classification" dropdown include "Excluded Entity", "Federal Organizations", "Exclusion Type", "Exclusion Program", and "Location".

5. Enter Staff Name, and then select **Add Individual**. Please note, this means you are adding one Individual to the query for the search. Yes, you can add more than one Individual, but they will appear on your exclusion document. This may be a privacy concern if you are placing the document in an Individual staff file.

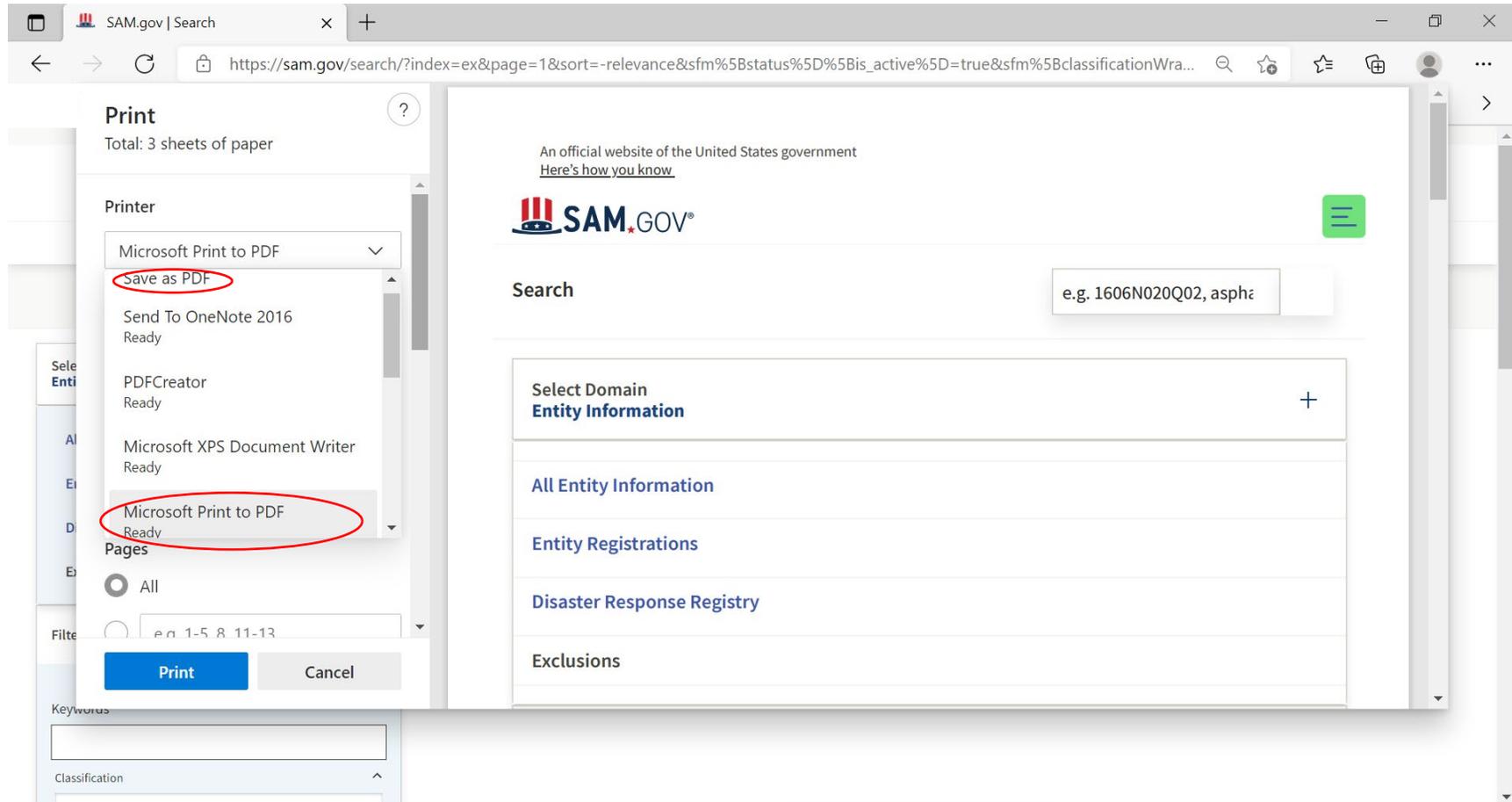


The screenshot shows a web browser window with the URL <https://sam.gov/search/?index=ex&page=18>. The page title is "Disaster Response Registry" and the section is "Exclusions". Under the "Filter By" section, there are several input fields: "Keywords" (empty), "Classification" (dropdown), and "Excluded Individual" (expanded). The "Excluded Individual" section contains four input fields: "First Name" (containing "Jane"), "Middle Name" (empty), "Last Name" (containing "Doe"), and "SSN / TIN" (empty). A green "Add Individual" button is located at the bottom of the form, with a red arrow pointing to it from the right. The "First Name" and "Last Name" fields are circled in red.

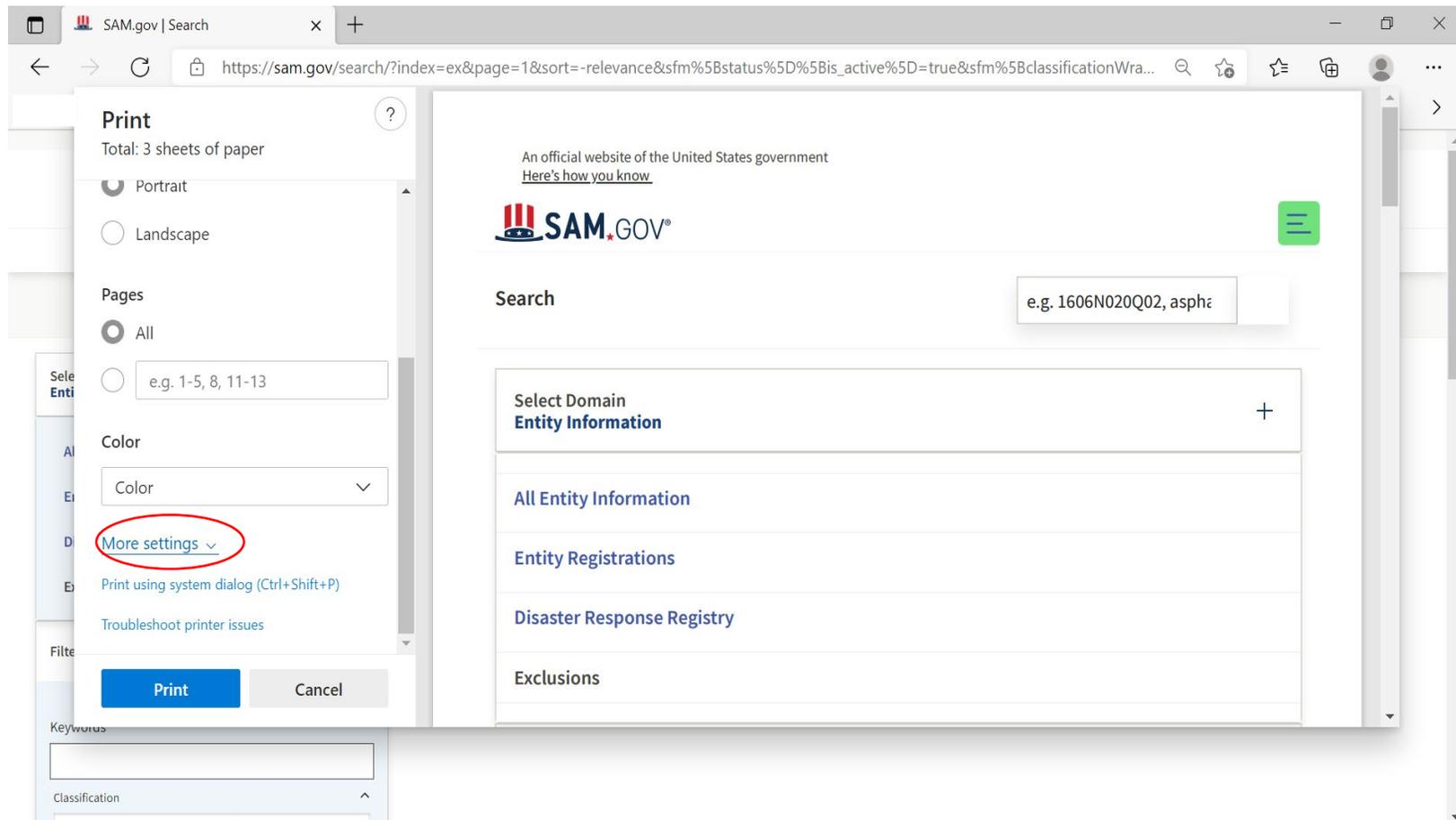
6. Scroll to the top of the webpage, that *should* display ‘No Matches Found’, then select the Print option, located within the ellipsis in the upper right-hand corner of your web browser.



7. Under the Printer option, **select one** of the following options from the drop-down menu:
- a. Microsoft Print to PDF, **or**
 - b. Save as PDF.

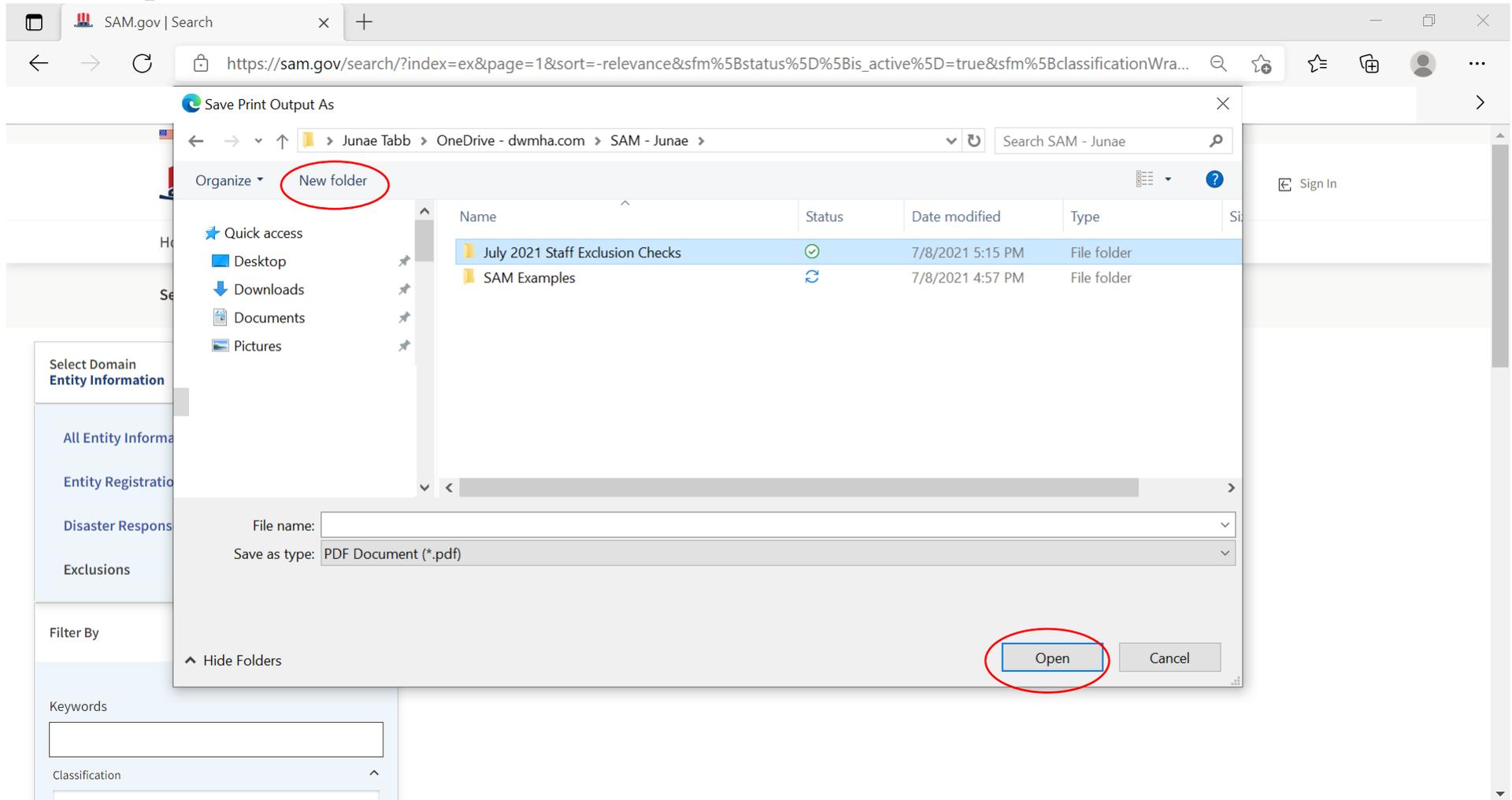


8. Under ‘[More settings](#)’, then ‘**Options**’, ensure that *Headers and footers* have been selected. This will enable the date of the SAM exclusion check to be viewed and saved on the document. Once Headers and Footers have been enabled, select the ‘Print or Save’ option.

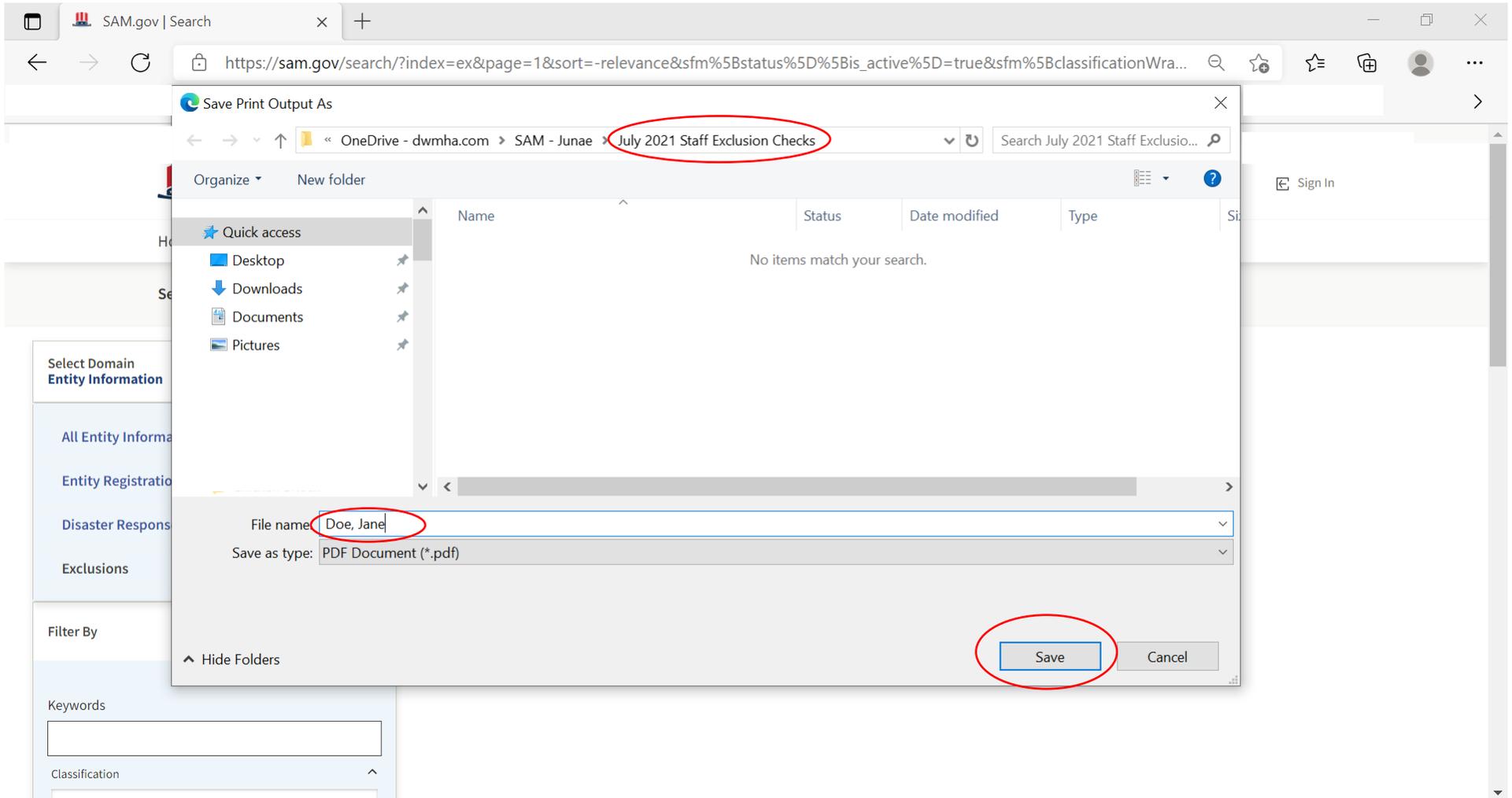


The screenshot shows a web browser window with the SAM.gov search page. A print dialog box is open on the left side. The print dialog has the following settings: Total: 3 sheets of paper, 100 copies, 1 page per sheet, and Default margins. Under the 'Options' section, the 'Headers and footers' checkbox is checked, and the 'Background graphics' checkbox is unchecked. The 'Print' button is highlighted with a red circle. In the background, the SAM.gov search page is visible. The date '7/8/2021' in the top left corner of the page is circled in red, and a red arrow points to it from the right. The page header includes the SAM.gov logo and the text 'An official website of the United States government Here's how you know'. The search bar contains the text 'e.g. 1606N020Q02, asphz'. Below the search bar, there are several menu items: 'Select Domain Entity Information', 'All Entity Information', 'Entity Registrations', 'Disaster Response Registry', and 'Exclusions'.

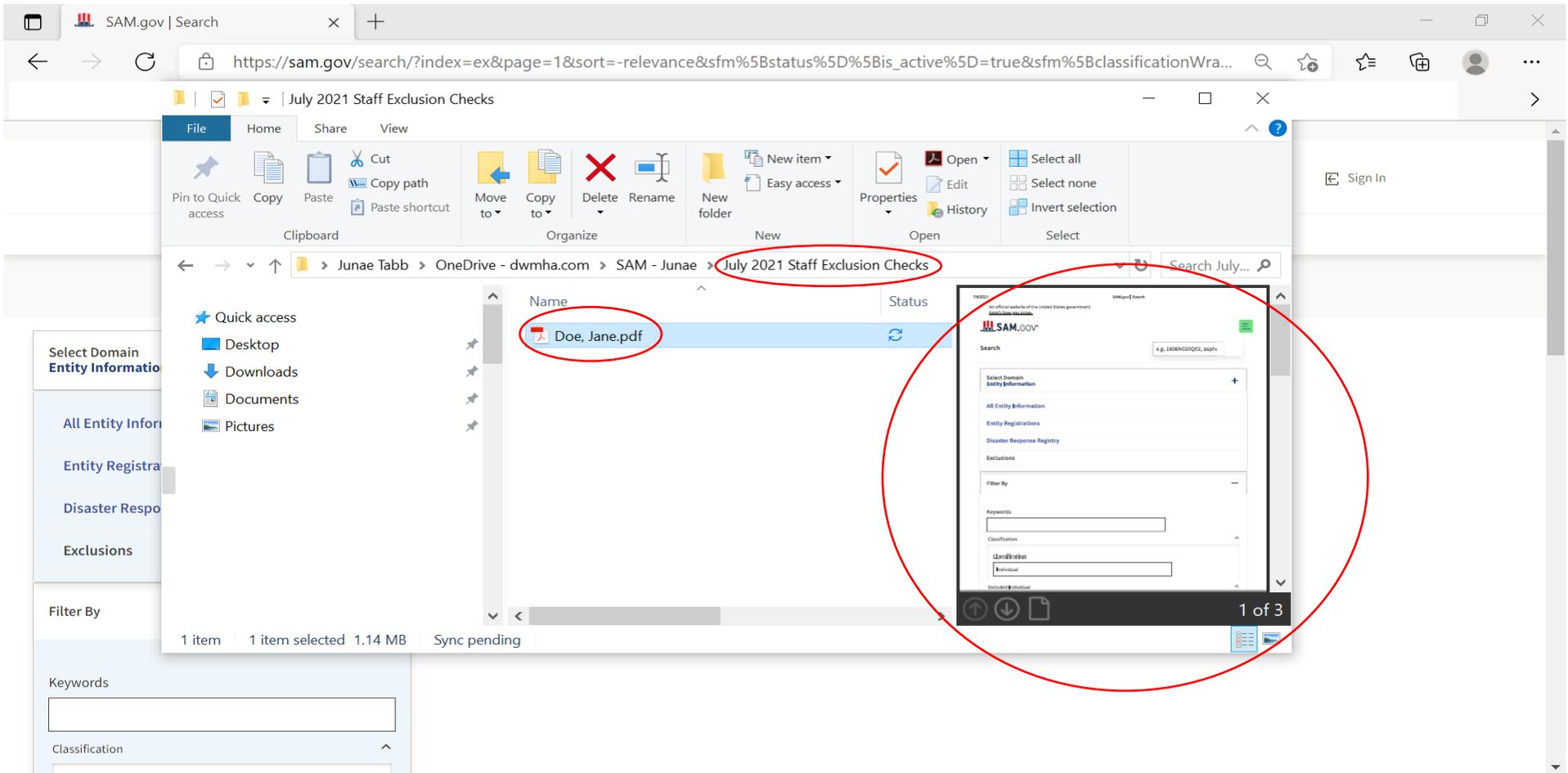
9. Once the 'Print or Save' option has been selected, the save to your computer option will appear. Create a new folder by selecting the New Folder option (circled below). You can title the folder **July 2021 SAM Staff Exclusions Checks** (as an example), and then select 'Open' to open the folder.



10. Once the folder has been opened, label the SAM exclusion check the appropriate name (i.e. Doe, Jane), and then select the Print or Save option.



11. Jane Doe July 2021 SAM Exclusion check is now completed, documented, and saved to your computer for your records, see example below.



12. See example of Jane Doe July SAM Exclusion Check below.

An official website of the United States government
Here's how you know



Search

e.g. 1606N020Q02, asphz

Select Domain
Entity Information



All Entity Information

Entity Registrations

Disaster Response Registry

Exclusions

Filter By



Keywords

[Redacted]



[Redacted]

Excluded Individual



First Name

Middle Name

Last Name

SSN / TIN



- Excluded Entity ▼
- Federal Organizations ▼
- Exclusion Type ▼
- Exclusion Program ▼
- Location ▼
- Dates ▼

More Filters ☰

Reset ↻



No matches found

We couldn't find a match for your search criteria.

Please try another search or go back to previous results.

[Go Back](#)



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