FREE CHECKLIST

Federal Grant Registration Checklist (Free PDF)

The registration steps to finish before a first federal application, what to gather first, who owns each account and when to renew, checked against the official sites.

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> An organization has to be registered in federal systems before it can submit a federal grant application. This checklist puts the steps in order and records who holds each account. It summarizes what SAM.gov, Grants.gov and era.nih.gov say. Those sites and the funding opportunity itself come first, so follow them where they differ from this page.

Checked November 2026. Confirm current steps on the official sites.

Registration is free

SAM.gov states that it is free to use and that there is no charge to get a Unique Entity ID, register your entity or maintain your registration. Grants.gov also states that it is free to register. You are not required to pay a third party to register or renew. If a company contacts you offering to do it for a fee, you can decline and use the official sites and their help desks.

Organization details

Legal name of the organization:

Unique Entity ID (once assigned):

First federal deadline we are working toward:

Date we started registration:

Gather these first

The Entity Registration Checklist on SAM.gov lists what a registration asks for. These are the items most organizations need to find before they start. Download the current checklist from SAM.gov for the full list.

- [ ] Legal business name, exactly as it appears on official records
- [ ] Physical address (SAM.gov says a post office box may not be used as the physical address)
- [ ] Date and state of incorporation
- [ ] Taxpayer Identification Number (TIN) and the taxpayer name and address that go with it
- [ ] Organization start date and the date the fiscal year ends
- [ ] Bank details for electronic funds transfer: account type, routing number, account number
- [ ] Names and contact details for the people who will be points of contact
- [ ] The name and email address of the person who will be the Electronic Business Point of Contact

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Step 1. Register the organization in SAM.gov

SAM.gov says an entity that wants to apply for federal awards as a prime awardee needs a registration, and that a Unique Entity ID is assigned as part of registration.

- [ ] Checked whether the organization is already registered by searching SAM.gov
- [ ] Created the sign-in accounts needed (Grants.gov notes you will need accounts with SAM.gov and Login.gov to search SAM.gov)
- [ ] Chose the registration purpose. SAM.gov offers "All Awards" and "Financial Assistance Awards Only", which covers grants and loans only
- [ ] Entered the legal name and physical address and received the Unique Entity ID
- [ ] Completed the remaining sections SAM.gov asks for (for financial assistance only: Core Data, Reps and Certs, Points of Contact)
- [ ] Named the Electronic Business Point of Contact, with an email address that person will keep
- [ ] Submitted the registration and confirmed the status shows as active

A Unique Entity ID alone is not enough to apply. SAM.gov says an entity that only gets the ID, without registering, cannot apply directly for federal awards.

Step 2. Set up Grants.gov

Grants.gov says you cannot start applying until the organization is registered in SAM.gov.

- [ ] The Electronic Business Point of Contact (called the EBiz POC in Grants.gov) created a Grants.gov account using the same email address listed in SAM.gov
- [ ] The EBiz POC added an organization applicant profile using the Unique Entity ID
- [ ] Each person who will work on applications created a Grants.gov account
- [ ] The EBiz POC assigned roles. Grants.gov lists Authorized Organization Representative (AOR), Workspace Manager and custom roles
- [ ] Each person checked their role on the Manage Profiles tab of the My Account page
- [ ] At least one person who can commit the organization holds the role needed to submit

Step 3. Register in agency systems the program requires

Some agencies use their own system as well as, or instead of, Grants.gov. The funding opportunity tells you which. Read its registration section before you assume Grants.gov is enough.

System this opportunity requires, copied from the funding opportunity:

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For programs that use eRA Commons, era.nih.gov describes these steps:

- [ ] A signing official registered the organization using the Register Organization link on the eRA Commons home screen
- [ ] The signing official entered the Unique Entity ID, which the system checks against SAM.gov
- [ ] The signing official answered the email verification (era.nih.gov says the request is canceled if there is no response within 8 days)
- [ ] The signing official, or another authorized account holder, created the account for the project director or principal investigator. A principal investigator cannot create their own account

Allow enough time

Do not plan around a fixed number of days. Grants.gov says to allow up to 10 business days for a SAM.gov registration to become active even when the organization has a federal tax ID, and that it could take weeks or months if information is not available or cannot be verified. Start registration as soon as a federal application is likely, and check the official sites for current timing.

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Who owns each account

Accounts tied to one person's email are a common cause of last-minute trouble. Record who holds each one and who can step in.

System	Role	Person	Email used	Backup person
SAM.gov	Person who manages the entity registration			
SAM.gov	Electronic Business Point of Contact			
Grants.gov	EBiz POC			
Grants.gov	Authorized Organization Representative			
Grants.gov	Workspace Manager			
Agency system (name it)	Signing official or equivalent			
Agency system (name it)	Project director or principal investigator			

Renewal reminders

SAM.gov says you must renew your registration every 365 days to keep it active. A lapsed registration can stop a submission.

SAM.gov registration active until:

Reminder set for (date, and whose calendar):

Person responsible for renewal:

- [ ] The renewal date is on a shared calendar, not one person's
- [ ] We check the SAM.gov status before starting each federal application
- [ ] When staff leave, we update points of contact in SAM.gov and roles in Grants.gov
- [ ] Sign-in details are stored where the organization, not one employee, can reach them

Before each federal application

- [ ] SAM.gov registration is active and will stay active past the deadline
- [ ] The legal name and Unique Entity ID on the application match SAM.gov
- [ ] The person who will submit can sign in and has the right role
- [ ] Any agency system named in the funding opportunity is set up
- [ ] We have re-read the registration section of the funding opportunity

Where to get help

Use the help each official site lists. SAM.gov points registrants to the Federal Service Desk. Grants.gov has a Support Center and an Online User Guide. For eRA Commons, use the help listed on era.nih.gov. For questions

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about one program's requirements, contact the agency contact named in the funding opportunity.

Notes:

> **Want help with this?** The Complete Grant Architect is a free 16-week grant writing course, and you can hire a grant writer for your next proposal. Both are at subthesis.com.

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