Instructions for @

Managing your Certify Business Profile

Vendor Administrator Role

Version 2.9

June, 2017
Table of Contents

Privacy Notice .......................................................................................................... 3
Purpose of this Document......................................................................................... 3
Create a User ID........................................................................................................... 4
Connect your Business with Certify............................................................................... 5
Apply for an SBA Contracting Program............................................................................ 6
Authorize Federal Contracting Officers (WOSB/EBWOSB only)....................................... 9
Printing your Certificate Letter ................................................................................... 10
Glossary .................................................................................................................... 10
Appendix.................................................................................................................... 10
  SBA Contacts............................................................................................................ 10
  Frequently Asked Questions..................................................................................... 11
    General Questions................................................................................................ 11
    WOSB / EBWOSB Related Questions ..................................................................... 12
Privacy Notice

Your business profile may contain sensitive business and personal information that should not be shared with others. SBA requires that only the qualified Business Owners apply and maintain the information required to participate in our contracting programs. The qualifying Business Owner will be required to electronically sign applications, asserting that the information is correct and the Owner is authorized to enter into legal agreements with the Federal Government.

SBA’s electronic system enables you to organize, complete and submit your application for government contracting and business development program certifications to the SBA. SBA secures the information you proved using certify.SBA.gov. You are responsible for maintaining the confidentiality of any username and password you create for any and all activities that occur under your account. You agree to protect and keep confidential your account information including user IDs, passwords, pins or any other means of accessing your account. If you disclose any of the foregoing information, you assume all risks and losses associated with such disclosure. If you permit any other person to access your account or account information, you are responsible for any resulting activities.

Purpose of this Document

The purpose of this document is to guide you through common tasks when using the certify.SBA.gov platform.
Create a User ID

In order to access certify.SBA.gov you’ll need to create a user account.

What you’ll need:

1. First and Last Name
2. Email you can access
3. Strong Passphrase
4. Prove you are not a robot
5. Be the owner/operator of the business (otherwise the incorrect name will appear on the signature page)

Instructions:

1. In the certify.SBA.gov homepage select the **Get Started button**.
2. Enter the information in the provided fields, in the **New User Registration page**. Required fields are marked with an asterisk (*).
3. Write a Strong Passphrase. Pick four words (or more) that you can easily remember to create your passphrase. Generally, the longer a passphrase is, the stronger it is. Your passphrase must be labelled strong in order to be accepted
4. Check I Accept and I’m not a Robot (and complete the re-captcha test) at the bottom of the page. Then select the Submit button.

I accept

I’m not a robot

Submit Cancel

Note: If you never received an email from us, try the following:

- Verify your spam, junk and bulk mail folders. Sometimes our emails are filtered as spam.
- Add ceretify@sba.gov to your contacts or approved list. Sometimes our emails are blocked as spam as well.

Connect your Business with Certify
The first step towards getting your business certified is to register it on the Certify platform.

Connect my profile to a business

You can connect with a business by using the following information to attach your profile to a business profile.

DUNS Number*

TIN Number*

MPIN*

* Additional information required

Do not click "Find business" if you are not the qualifying business owner.

SBA will only accept submissions and digital signatures from qualifying business owners. If you are NOT the business owner, please do not proceed. In order to protect personal financial information entered into the system, only the qualifying business owner will have access to their business records.

Find Business

What you’ll need:

1. DUNS Number (from Duns and Bradstreet)
2. TIN Number (from IRS)
3. MPIN (from SAM.gov)
4. The type of your business (LLC, Corp., S-Corp., Partnership, etc.).

Instructions:

1. Enter the numbers and information required (DUNS Number, TIN, MPIN) into the fields with no spaces or dashes. The MPIN is additionally case-sensitive.
2. These must match exactly as they are on SAM.gov.
3. Once entered select Find Business. This will attempt to match your business with the SAM record.
4. From the search results select your business and Select the Business Type from the drop-down. Then select Connect to Business and this will connect your Certify account with your business.

Note:

Your SAM.gov records must have an “Active” status for you to be able to access your records in certify.SBA.gov. Changes to records in SAM.gov can take up to 72 hours to transfer to certify.SBA.gov.

Apply for an SBA Contracting Program
Certify allows you to apply to various SBA programs.
My SBA Contracting Programs

There are currently no programs.

Join a new program

You may only have one active WOSB application and one active EDWOSB application. You may have up to two active All Small MRP applications. If you need to make edits or changes to a submitted application, please contact the respective program office to release your application back to you: westest@iaa.gov.

- All Small Mentor-Protégé Program [Review requirements]
- R&D Document Upload
- Woman Owned Small Business (WOSB) Program [Review requirements]
- Economically Disadvantaged Woman Owned Small Business (EDWOSB) Program [Review requirements]

Start a new application

What you’ll need:

1. All supporting documents for your application in PDF form.
2. Preview the requirements of each program, as all questions in the application are required.

Instructions:

1. Select **Programs** in the top navigation bar. This page has links for each program’s requirements. Or you can go directly to a program’s application page from the **Dashboard**.
2. On the **My SBA Contracting Programs** page, select the type of certification and select **Start new application**.
3. Read the description of the program, then click **Accept**.
4. Inside the application you’ll now be prompted to answers a series of questions about your business, and **all questions are required**.
5. After reading and answering each question, select **Save and continue** to move on to the next question. The menu navigation on the left allows you to go back and change previous answers.
6. When a question requires supporting documentation, have it read it in **PDF format**. Select **Add required documents** and then select either: 1) **Upload** for new documents or 2) **Choose from document library**, if using a document from a
previous application. Documents may take a while to appear, as the system performs a virus scan on all documents.

7. Uploading a new document
   a. Use the Choose a .pdf file link or drag the file into the box. Please note it may take a while for the file to show as the server performs a virus check on the document.
   b. Rename the file in the Name field.
   c. Select the type of document it is from the drop-down in the Type field.
   d. Add any comments on the Comments (edit) field.
   e. You may remove the document before uploading. Be sure you have the right file.
   f. Select Upload

8. Choosing an existing document.
   a. After selecting Choose from document library, find the document you wish to associate with this question and mark the checkbox.
   b. Select Associate.

9. Once you’ve completed all the questions you’ll be taken to the Review section. Here you can change the answer to any section by selecting the Change answer link. Please review your application, and select Summit to proceed.

10. A pop-up message will appear. This is a warning message, because once you submit your application you cannot modify it. If your application is ready and all
the necessary documents associated, select Ok to proceed; select Cancel if you need to change or modify it or add additional documents.

11. On the Signature page, read then check the boxes next to all statements pertaining to you and your business. Select the Accept button at the bottom of the page to submit your final application.

12. You will be taken to the Dashboard and a success message will be displayed if your application was successfully submitted.

Authorize Federal Contracting Officers (WOSB/EBWOSB only)

Once a Contracting Offices (CO) summits the request for access to view your business WOSB (or EBWOSB) application, you have 7 days to approve or deny the request otherwise it expires. Contracting Officers are required to validate WOSB/EBWOSB eligibility prior to awarding a contract.

Instructions:

1. Within 7 days of the Contracting Officer’s (CO) request, complete the process of granting authorization.
2. Login into your certify.SBA.gov account.
3. Go and select the Business Tab in the top navigation bar.
4. Select Manage CO Access from the left side-bar navigation.
5. Make sure to validate the agency, contracting officer and solicitation number.
6. Click on the Accept or Deny button.

Note: The Contracting Officer has 90 days to review your documentation before access is automatically revoked. However, you can manually revoke CO access at any time.
Printing your Certificate Letter
You might want a copy of your certification for your records.

Instructions:

1. Go to the Dashboard. Once you have successfully joined one of SBA certification programs they’ll show up on your Dashboard.
2. Under the My SBA Contracting Programs section select your program by selecting the name. This will take you to a summary page of your certification.
3. Go to the Certificate Letter tab and select Click to view and print certificate letter. This will take you to a PDF form letter you can print or download.

Glossary

DUNS Number – The Data Universal Numbering System (DUNS) Number is a unique nine-character identification number provided by the commercial company Dun and Bradstreet.

TIN Number – A Taxpayer Identification Number (TIN) is an identification number used by the Internal Revenue Service (IRS) in the administration of tax laws. It is issued either by the IRS or the Social Security Administration (SSA). Choices provided for the TIN type include: Employer Identification Number “EIN” or Social Security Number “SSN.”

MPIN – The Marketing Partner Identification Number (MPIN) is a self-created password from SAM.gov.

Appendix

SBA Contacts

SBA Program Offices:
Women-Owned Small Business Program (WOSB)  wosb@sba.gov
Frequently Asked Questions

General Questions

What does an “account inactive” error mean?
An inactive account means that your records in SAM.gov are not in the Active state. Please update your records in SAM.gov and wait up to 72 hours before returning to complete your application.

How do I set a strong passphrase?
A strong passphrase is a unique combination of at least four words that you can easily remember. Add a space, special character and/or number for added security. The passphrase must be showing “strong” in order to work.

How do I delete documents?
Once a document has been uploaded it cannot be deleted. However, we are currently building the functionality for you to archive documents that are outdated or no longer needed. Once that functionality is in place, you will be able to more efficiently manage your document library.

What do I do if I get a “Business not found” error?
Your records in SAM.gov must be in the “Active” status to be able to access your records in certify.SBA.gov. Any changes to records in SAM.gov can take up to 72 hours to transfer to certify.SBA.gov.

If your records have been “Active” in SAM.gov for more than 72 hours, please check your DUNS, TIN/EIN and MPIN one more time. They must match exactly as they are displayed in SAM.gov. The DUNS and EIN should be numbers only (no spaces or dashes) and your MPIN is case sensitive.

If you still cannot associate your business, please go to SAM.gov and verify that your MPIN is correct by following the steps below:
Go to the SAM.gov Homepage: [www.sam.gov](http://www.sam.gov)

Enter your user ID and password, then click the “Log in” button

Once logged in, go to the “My SAM” page and click on “Register/Update Entity” on the left-hand side, then click “Complete Registrations”

Scroll to the bottom and click on your company in the Entity List

Click on the silver “View” button – this will take you to the entity dashboard

Go to the left-hand side and click “Entity Record”

Your MPIN is the last piece of information listed under “Business Information”

If these steps do not resolve the problem, please provide your DUNS number in your response so that we can do further research.

Did Not Receive Email

We have identified an issue with some email or internet services providers (ISPs) not accepting our system generated emails, and have made updates to resolve the majority of the issues. However, we also know that there are some individual security settings that will continue to block our emails. Please try again by following the steps below.

1. In your email client, add [no-reply@certify.sba.gov](mailto:no-reply@certify.sba.gov) and [notifications@certify.sba.gov](mailto:notifications@certify.sba.gov) to your contacts list.

2. In your email client, add [no-reply@certify.sba.gov](mailto:no-reply@certify.sba.gov) and [notifications@certify.sba.gov](mailto:notifications@certify.sba.gov) to the “Approved List” or “Sender Safe List.”

3. Click on the Resend Confirmation Instructions page: [https://certify.sba.gov/users/confirmation/new](https://certify.sba.gov/users/confirmation/new) to request a new email

WOSB / EBWOSB Related Questions

Where are the documents I uploaded in the old WOSB repository?

Access to the legacy WOSB document repository was disabled on March 23, 2016 at 1:00 EDT. At this time, documents that were associated with active accounts were migrated to the new system. All accounts that had been updated with at least one new document since October 1, 2014 were considered active accounts and as such, were migrated to the new system.

In order to update your records, you will need to complete the new online questionnaire for the certification you are interested in (WOSB and/or EDWOSB). Please
log in to certify.SBA.gov and click the “certifications” link and select the certification you qualify for. At the appropriate question, you will be required to upload new documents or associate existing documents to support your answers.

NOTE: All documents must be in PDF format to upload to the system.

Is my WOSB registration reviewed? Do I receive a certification letter?
Self-Certification means that SBA does not review the documents until you are actually competing for a contract. As a result, there is no certificate as such - just a letter that your documents have been uploaded. It is up to you to make sure that all of your documents are in the repository. If you’ve followed all of the instructions on the website, you should be set to submit proposals as a WOSB/EDWOSB.

To complete the process, please make sure to update your entity in SAM.gov to reflect your WOSB/EDWOSB status.