SBA U.S. Small Business Administration

User Guide

Managing Your Certify Business Profile:
Vendor Administrator Role

October 2021

Description

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

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.

Create a User ID

In order to access certify.SBA.gov your will need to create a user account

What you will need:

1. First and Last Name
2. Email you can access
3. Strong Passphrase
4. Proof that 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, on 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, 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 their captcha test) at the bottom of the page. Then select the **Submit button**.

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 certify@sba.gov to your contacts or approved list. Sometimes our emails are blocked as spam as well.

certify.SBA.gov

Home   Prepare   Am I eligible?   Help   COVID-19 Guidance   8(a) Participation Extension

Create certify.SBA.gov Account

Before you get started, make sure your business has a SAM.gov account. We will need your information from SAM.gov in order to connect your business with certify.SBA.gov.

You must be an owner or legal representative of the firm registering for certify.SBA.gov and have signature authority on the firm's behalf.

First Name

Last Name

Email Address

Confirm Email Address

Continue

Next you will create a password.

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Connect Your Business with Certify

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

What you will need:

1. UEI (from SAM.gov)
2. TIN (from IRS)
3. CAGE Code (from CAGE), if applicable (if you do not have a CAGE code, leave this field blank)
4. Bank Account Number (that matches the CAGE code above, if you have one)
5. Your business structure type (LLC, Corp., S-Corp., Partnership, *etc.*).

Instructions:

1. Enter the numbers and information required (UEI, TIN, CAGE Code, Bank Account).
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.gov 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.

Connect your SAM.gov data to Certify

IMPORTANT NOTE: SBA will only accept submissions and digital signatures from primary, majority business owners or their legal designee. If you are not the primary, majority business owner or legal designee, DO NOT PROCEED.

- Your SAM.gov account must be active to connect to Certify.
- Please ensure your SAM.gov data is current <u>before</u> you submit your Certify application.
- Changes in SAM.gov can take up to 72 hours to display in Certify.

All fields are required

UEI

`VN5338395301`

(12 characters no spaces or dashes)

TIN

`123456789`

(9 DIGIT NUMBER no spaces or dashes)

SAM.gov Bank Account Number

`**********`

(Alphanumeric value up to 20 characters, as reported in SAM.gov during SAM registration)

NOTE! SBA does not store a retrievable version of your bank account number. To retrieve the bank account number you entered in SAM.gov during your SAM registration, log into SAM. If you require login assistance, contact the GSA Federal Service Desk Monday – Friday, 8 a.m. – 8 p.m. via Live Chat or by phone at 866-606-8220
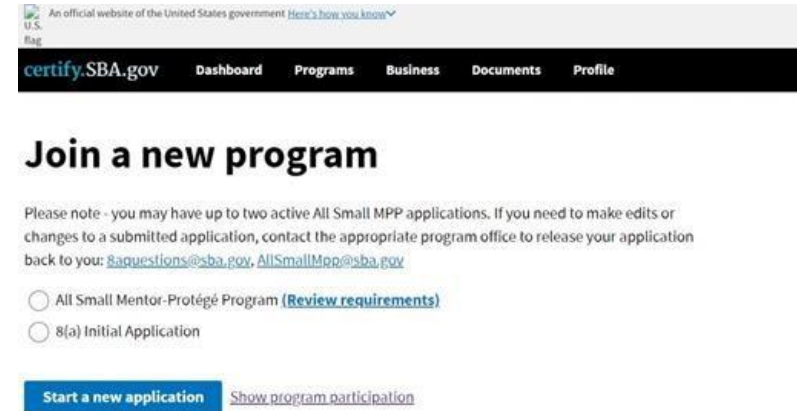
Apply for an SBA Contracting Program

Certify allows you to apply for various SBA Programs

What you will need:

1. All supporting documents for your application are 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. You can also 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 a new application**.

3. Read the description of the program, and then click **Accept**.

4. Inside the application you'll now be prompted to answer 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 onto the next question. The menu navigation on the left allows you go to back and change previous answers.

Apply for an SBA Contracting Program

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 from the drop-down in the **Type** field.
   d. Add any comments in the **Comments (edit)** field.
   e. You may remove the document before uploading. Be sure you have the correct 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 will be taken to the **Review** section. You can change the answers in any section by selecting the **Change** answer link. Please review your application and select **Submit** 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 are associated, select **Ok** and proceed; select **Cancel** if you need to change, modify, or add additional documents.
11. On the signature page, review everything and 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.

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 will 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.

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Glossary

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

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".

Appendix

SBA Program Offices:

- Women-Owned Small Business Program (WOSB)   wosb@sba.gov
- Mentor-Protégé   allsmallmpp@sba.gov
- 8(a) Business Development Program   8aquestions@sba.gov
- HUBZone   hubzone@sba.gov

Frequently Asked 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?

Click the "Documents" link in the navigation bar at the top of the page to view your Document Library. Click the trash can icon to archive a document. Archived documents remain viewable by SBA but no longer appear in the documents list for the application.

Note: You cannot delete documents that have been uploaded in Certify.

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Appendix

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 UEI, TIN/EIN, CAGE Code (if applicable), and Bank Account one more time. They must match exactly as they are displayed in SAM.gov.

Additionally, if you have multiple CAGE Codes and Bank Account Numbers in SAM.gov, you must provide a matched pair of those values.

If these steps do not resolve the problem, please submit a ticket to the Certify Help Desk and provide your UEI 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 most 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 and notifications@certify.sba.gov to your contacts list.

2. In your email client, add no-reply@certify.sba.gov and 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 to request a new email.