

# ***Managing your Certify Business Profile***

*Vendor Administrator Role*

***Version 2.9***

August 2018

## 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 provide 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 will need to create a user account.



### New User Registration

Please create a new user account. You will then be prompted to associate your user account with the information about your firm (from [SAM.gov](#)) in order to manage your SBA Programs.

#### Please create a certify.SBA.gov account

##### Enter Name

First Name\*

Last Name\*

Phone Number

\*Required field

##### Enter Email and Passphrase

Email\*

Passphrase\*

[Show my typing](#)

Passphrase strength -Weak

Your passphrase must be strong to submit.

Confirm Passphrase\*

##### Passphrase

Secure your account by creating a strong passphrase. The passphrase meter will indicate if your passphrase is strong enough. Your passphrase must be "strong" in order to continue the registration. See below for examples of a strong passphrase. You can create a strong passphrase by following these guidelines:

- Use 4 random but memorable words
- Don't form a sentence
- Don't use previous passphrases
- Special characters and numbers are helpful but not necessary
- Don't use personally relevant words that are publicly available (your real name, company name, industry, email/username etc...)

#### 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, 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, 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

reCAPTCHA  
Privacy - Terms

**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 [certify@sba.gov](mailto:certify@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\*

(9 DIGIT NUMBER)

TIN Number\*

(9 DIGIT NUMBER)

MPIN\*

(4-12 DIGITS)  
\* Indicates required field(s)

The Data Universal Numbering System (DUNS) Number is a unique nine-character identification number provided by the commercial company Dun and Bradstreet (D&B). Visit D-U-N-S Request Service to obtain more detailed instructions on applying for a DUNS Number.

A Taxpayer Identification Number (TIN) is a 9 digit 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). Additional choices provided for TIN Type include: Employer Identification Number "EIN", or Social Security Number "SSN". The Marketing Partner Identification Number (MPIN) is a self-created password in [SAM.gov](http://SAM.gov). The MPIN may contain 4 to 12 alphanumeric digits and is case sensitive.

**WARNING:**

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**

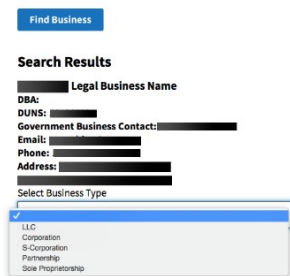
What you will need:

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 MPP 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: [wosb@sba.gov](mailto:wosb@sba.gov), [AllSmallMpp@sba.gov](mailto:AllSmallMpp@sba.gov)

- All Small Mentor-Protégé Program ([Review requirements](#))
- 8(a) 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 will 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. 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 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 on to the next question. The menu navigation on the left allows you go to back and change previous answers.
6. When a question requires supporting documentation, it must be 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 several minutes to appear, as the system

performs a virus scan on all documents.

7. Uploading a new document

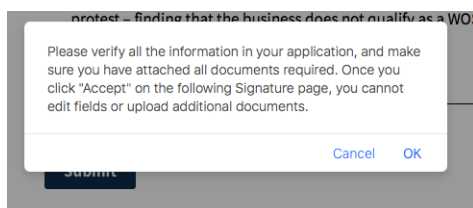
- a. Use the Choose a .pdf file link or drag the file into the box. Please note it may take a while for the file to show as the server performs a virus check on the document.
- b. Rename the file in the **Name** field.
- c. Select the type of document from the drop-down in the **Type** field.
- d. Add 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** to proceed; select **Cancel** if you need to change or modify it 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.

**i Info**

You have been successfully associated with the organization.

**Welcome to your certify.SBA.gov dashboard. You have successfully connected your business from SAM.gov.**

To get started on an application, select which program you'd like to join below. You may only upload documents to certify.SBA.gov during the application process. While completing the online questionnaire, you will be instructed to upload documents to support your answers. These online applications replace any forms released by SBA for these contracting programs in the past.

Get started now on your [WOSB self-certification](#), [EDWOSB self-certification](#), [All Small Business Mentor-Protégé agreement](#), or [8\(a\) Document Upload](#).

Welcome blank5  
Last logged in at 2017-04-28 13:54:05  
UTC

## Authorize Federal Contracting Officers (WOSB/EBWOSB only)

Once a Contracting Offices (CO) submits the request for access to view your business WOSB (or EBWOSB) application, you have 7 days to approve or deny the request or else it will expire. 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 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.

## 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](mailto:wosb@sba.gov)

All Small Mentor Protégé	<a href="mailto:allsmallmpp@sba.gov">allsmallmpp@sba.gov</a>
8(a) Business Development Program	<a href="mailto:8abdhotline@sba.gov">8abdhotline@sba.gov</a>
HUBZone	<a href="mailto:hubzone@sba.gov">hubzone@sba.gov</a>
certify.SBA.gov (technical questions only)	<a href="mailto:help@certify.sba.gov">help@certify.sba.gov</a>

## 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 “Login” 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 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> 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. Select the certification for which you qualify. Some questions may require you 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.