

Why Do I Have to Provide My CAGE Code and Bank Account Number?

<https://sbaone.atlassian.net/wiki/spaces/CKB/pages/2721546311/Why+Do+I+Have+to+Provide+My+CAGE+Code+and+Bank+Account+Number>

SBA must validate ownership of a company before it can be claimed in Certify. To this end, we require applicants to enter the following data from their SAM profiles:

- Company UEI
- CAGE Code (if available)
- Company TIN (this can be an EIN or SSN, depending on what was registered in SAM.gov)
- Bank Account Number

In the past, SAM.gov used the MPIN to validate company ownership, but this field has been retired by GSA.

The CAGE Code, and its matched Bank Account Number, have replaced MPIN to support this function (if you do not have a CAGE code, then you will only have one Bank Account Number registered with SAM.gov).

NOTE that for security purposes, SBA does not store any firm's Bank Account Number; it is encrypted with an irreversible cryptographic hash.

MPIN and SAM.gov Explained

<https://sbaone.atlassian.net/wiki/spaces/CKB/pages/82975175/MPIN+and+SAM.gov+Explained>

BEFORE:

The reason firms are required to register on SAM.gov in addition to Certify is that SAM.gov is how federal contract officers identify potential vendors for their contracts. In addition, prime contractors use SAM.gov to identify potential subcontractors and suppliers. States and local governments also consult the federal database of vendors. Therefore, firms must have active accounts in SAM.gov in order to apply for certification through SBA.

If a firm is having a hard time connecting a SAM.gov account to a Certify account, please make sure the DUNS, TIN, and MPIN match exactly with what's in [SAM.gov](https://sam.gov). DUNS and TIN numbers should not contain any spaces or dashes and your MPIN is case sensitive. We have copied instructions below on locating your MPIN in your SAM profile. It is different from your SAM password.

To view your company's MPIN:

1. Go to the SAM Homepage: www.sam.gov.
2. Enter your Entity Administrator user ID and password, and then click the "Log In" button.
3. Locate your entity via the "Existing Entity Registrations" link under "Entity Registrations" in the left

navigation pane.

4. Click the entity name in the Entity List.
5. Click "View" under "Registration Details."
6. From the Entity Dashboard select "Core Data."
7. Scroll down to the Business Information section to view the MPIN.

(Note: You must be the SAM Entity Administrator for the entity registration linked to your DUNS number in order to view the MPIN.)

AFTER:

SAM.gov Explained

Companies are required to register in SAM.gov because it is the Federal Government's system of record for federal awards and issuer of the Universal Entity Identifier (UEI), which is used to identify companies and organizations across all federal agencies. It also stores profile data for these organizations, used by federal contracting officers for various purposes. Therefore, firms must have active accounts in SAM.gov in order to apply for SBA certification programs.

If a firm is having difficulty connecting a SAM.gov account to a Certify account, please ensure that the UEI, TIN, CAGE Code, and Bank Account being entered into Certify match exactly with what's in [SAM.gov](https://sam.gov).

Register with SAM.gov and Create Your MPIN

<https://sbaone.atlassian.net/wiki/spaces/CKB/pages/152240186/Register+with+SAM.gov+and+Create+Your+MPIN>

BEFORE:

Visit [SAM.gov](https://sam.gov) and click “Create an Account” in the top right and proceed to create an Individual Account. [SAM.gov](https://sam.gov) will request your [DUNS](https://sam.gov) number. After you have submitted your information, your account must be approved in SAM to apply in Certify; the approval process can take several days.

AFTER:

Register with SAM.gov

Visit [SAM.gov](https://sam.gov), click “Create an Account” at the top right, and follow the instructions on the page to create an Individual Account. Note that there are two main steps to SAM.gov account creation: the first is a verification of your company details, and the second is to register with SAM.gov for Federal assistance awards. You will be issued a UEI after the first step, but you must make sure to complete both steps. After you have submitted your information, your account must be approved by SAM before it is activated and made available to other agencies and applications. This approval process can take up to several weeks; please refer to the SAM.gov site for more information. Once your account has been approved and activated, please wait 1-3 days for the new profile to be added to Certify.

~~Does not mention MPIN until the video that is linked. Should we make changes to the video?~~

Common Error Notices

<https://sbaone.atlassian.net/wiki/spaces/CKB/pages/90636303/Common+Error+Notices>

BEFORE:

"We're sorry, but something went wrong in processing your request."

When saving your application: The error that you are receiving indicates that you have not completed every question. Please start from the beginning and verify that you have answered each question and uploaded the correct documents as requested on every page. Click the "save and continue" button on each page to validate that the answers are recorded.

"Account inactive"

After logging into your account: An inactive account means that your records in [SAM.gov](https://sam.gov) are not in the Active state. Please update your records in [SAM.gov](https://sam.gov) and wait up to 72 hours before returning to complete your application.

"No Match Error"

Your records in [SAM.gov](https://sam.gov) must be in the "Active" status to be able to access your records in [certify.SBA.gov](https://certify.sba.gov). Any changes to records in [SAM.gov](https://sam.gov) can take up to 72 hours to transfer to [certify.SBA.gov](https://certify.sba.gov).

If your records have been "Active" in [SAM.gov](https://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](https://sam.gov). The DUNS and EIN should be numbers only (no spaces or dashes) and your MPIN is case sensitive.

Step-by-Step Guide

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

1. Go to the [SAM.gov](https://sam.gov) Homepage: www.sam.gov
2. Enter your user ID and password, then click the "Log In" button
3. Once logged in, go to the "My SAM" page and click on "Register/Update Entity" on the left-hand side, then click "Complete Registrations"
4. Scroll to the bottom and click on your company in the Entity List
5. Click on the silver "View" button – this will take you to the entity dashboard
6. Go to the left-hand side and click "Entity Record"
7. 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.

AFTER:

Common Error Notices

"We're sorry, but something went wrong in processing your request."

When saving your application: The error that you are receiving indicates that you have not completed every question. Please start from the beginning and verify that you have answered each question and uploaded the correct documents as requested on every page. Click the "save and continue" button on each page to validate that the answers are recorded.

"Account inactive"

After logging into your account: An inactive account means that your records in [SAM.gov](https://sam.gov) are not in the Active state. Please update your registration in [SAM.gov](https://sam.gov). After [SAM.gov](https://sam.gov) has reviewed and activated your changes, please wait 72 hours before returning to complete your application.

"No Match Error"

Your records in [SAM.gov](https://sam.gov) must be in the "Active" status to be able to access your records in [certify.SBA.gov](https://certify.sba.gov). Any changes to records in [SAM.gov](https://sam.gov) can take up to 72 hours to transfer to [certify.SBA.gov](https://certify.sba.gov), AFTER they have been reviewed and activated by SAM.gov.

If your records have been "Active" in [SAM.gov](https://sam.gov) for more than 72 hours, please check your UEI, TIN, CAGE Code (if applicable), and Bank Account one more time. They must match exactly as they are displayed in [SAM.gov](https://sam.gov).

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

What do I do if I get a “No Match Found” error

<https://sbaone.atlassian.net/wiki/spaces/CKB/pages/80909520/What+do+I+do+if+I+get+a+No+Match+Found+error>

BEFORE:

Your records in [SAM.gov](https://sam.gov) must be in the “Active” status to be able to access your records in [certify.SBA.gov](https://certify.sba.gov). Any changes to records in [SAM.gov](https://sam.gov) can take up to 72 hours to transfer to [certify.SBA.gov](https://certify.sba.gov).

If your records have been “Active” in [SAM.gov](https://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](https://sam.gov). The DUNS and EIN should be numbers only (no spaces or dashes) and your MPIN is case sensitive.

Step-by-step guide

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1. Go to the [SAM.gov](https://sam.gov) Homepage: www.sam.gov
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AFTER:

What do I do if I get a “No Match Found” error

Your records in [SAM.gov](https://sam.gov) must be in the “Active” status to be able to access your records in [certify.SBA.gov](https://certify.sba.gov). Any changes to records in [SAM.gov](https://sam.gov) can take up to 72 hours to transfer to [certify.SBA.gov](https://certify.sba.gov).

If your records have been “Active” in [SAM.gov](https://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](https://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 help ticket through the Certify Help Portal (<https://certify.sba.gov/help>) and provide your UEI in your response so that we can do further research.

Create an Account on Certify

<https://sbaone.atlassian.net/wiki/spaces/CKB/pages/80908890/Create+an+Account+on+Certify>

BEFORE:

Quick Notes: Firm owners, and not third parties or other staff, must create their accounts in Certify. To get started, firm owners will need their DUNS number, TIN (EIN or SSN), and MPIN from their active [SAM.gov](#) profile. Please visit your [SAM.gov](#) account before getting started to make sure all the information is up to date and that your SAM account is "Active." Finally, one email address is currently allowed in Certify per business. Therefore, entity-owned firms will need a different email address for each annual review.

1. Visit [certify.SBA.gov](#) and click the Get Started button.
2. Enter your information and create a strong passphrase (four random words linked together works well)
3. Check your email within 48 hours for an email from Certify and click the link in email to activate your account.
 - a. Add certify@sba.gov to your contacts/approved list so the email is not blocked as spam
 - b. If you do not receive your verification email within 48 hours, please email the Help Desk at help@certify.sba.gov to request a password reset.
4. Log back into [certify.SBA.gov](#) and connect your SAM.gov profile to Certify by entering your DUNS, TIN, and MPIN, then click "Connect data."
5. Select your business type - LLC, Corporation, S-Corporation, Partnership, or Sole Proprietorship - and click "Connect to business."

Should you need assistance creating your account, please email the Help Desk at help@certify.SBA.gov.

+ Entity-Owned Firms: Please find additional details here: [Entity-Owned Firms: Supplemental Documents for 8\(a\) in Certify](#).

+ Watch a video of how to create an account: [Create Your Certify Account](#)

AFTER:

Create an Account on Certify

Note: Firm owners, **and not third parties or other staff**, must create their accounts in Certify. To get started, firm owners will need their company UEI, TIN (EIN or SSN, per SAM.gov), CAGE Code (if applicable), and Bank Account from their active [SAM.gov](#) profile. Please visit your [SAM.gov](#) account before getting started to make sure all the information is up to date and that your SAM account is "Active." Finally, only one unique email address is currently allowed in Certify per business. Therefore, entity-owned firms will need a different email address for each business.

1. Visit certify.SBA.gov and click the Get Started button.
2. Enter your information and create a strong passphrase (four random words linked together works well)
3. Check your email within 48 hours for an email from Certify and click the link in email to activate your account.
 - a. Add certify@sba.gov to your contacts/approved list so the email is not blocked as spam
 - b. If you do not receive your verification email within 48 hours, please email the Help Desk at help@certify.sba.gov to request a password reset.
4. Log back into certify.SBA.gov and connect your SAM.gov profile to Certify by entering your UEI, TIN, CAGE Code, and Bank Account, then click "Connect data."
5. Select your business type - LLC, Corporation, S-Corporation, Partnership, or Sole Proprietorship - and click "Connect to business."

Should you need assistance creating your account, please submit a ticket to the Certify Help Portal at <https://certify.sba.gov/help> .

+ Entity-Owned Firms: Please find additional details here: [Entity-Owned Firms: Supplemental Documents for 8\(a\) in Certify](#).

Change my Certify Login email address

<https://sbaone.atlassian.net/wiki/spaces/CKB/pages/1014005761/Change+my+Certify+Login+email+address>

BEFORE:

This HowTo will walk you through how to change your email address in Certify. Please note that this does not change your email address in [SAM.gov](#).

1. Log into [Certify.sba.gov](#) with your current email address.
2. Click "Profile"



3. Click "Edit Profile"

My profile

Your First Name Your Last Name

FIRST NAME: Your First Name

LAST NAME: Your Last Name

EMAIL: [REDACTED]

PHONE: 000-000-0000



4. On this screen you can edit your First and Last Name, your phone number and your email address. Then enter your MPIN and click "Update"

Edit Profile

First name

Last name

Phone number

Email

You must enter your MPIN to update your profile.

Update

5. You will receive an email confirmation to confirm the active email address. Once the email is confirmed you will be able to log into [Certify.sba.gov](https://certify.sba.gov) with the new email address.

AFTER:

Change my Certify Login email address

This HowTo will walk you through how to change your email address in Certify. Please note that this does not change your email address in [SAM.gov](https://sam.gov).

1. Log into [Certify.sba.gov](https://certify.sba.gov) with your current email address.
2. Click "Profile"

[certify.SBA.gov](https://certify.sba.gov) [Dashboard](#) [Programs](#) [Business](#) [Documents](#) [Profile](#) [Notifications](#) [My Account](#) [Help](#)

3. Click "Edit Profile"

My profile

Your First Name Your Last Name

FIRST NAME: Your First Name

LAST NAME: Your Last Name

EMAIL: [REDACTED]

PHONE: 000-000-0000

Edit Profile

Edit Password

4. On this screen you can edit your First and Last Name, your phone number and your email address. Then enter your CAGE code, if applicable, and the SAM.gov Bank Account Number associated with that CAGE, and click "Update".

Profile

First name

Barney Hackett

Last name

Leo Bahringer

Phone number

For example, 123-456-7890

[REDACTED]

Email

amberly_reynolds@heathcote.com

CAGE Code

[REDACTED]

(Leave blank if you do not have a CAGE Code)

SAM.gov Bank Account Number

[REDACTED]

(Enter this exactly as shown in SAM.gov for the associated CAGE, if applicable)

Update

5. You will receive an email confirmation to confirm the active email address. Once the email is confirmed you will be able to log into [Certify.sba.gov](https://certify.sba.gov) with the new email address.

Connect your Business with Certify

<https://sbaone.atlassian.net/wiki/spaces/CKB/pages/82197490/Connect+your+Business+with+Certify>

BEFORE:

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

What you'll need:

1. DUNS Number (from [Dun 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](#).

AFTER:

Connect your Business with Certify

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

What you'll need:

1. UEI (from [SAM.gov](#))
2. TIN (from [IRS](#))
3. CAGE Code (from [CAGE](#)), if applicable
4. Bank Account Number (that matches the CAGE code above)

5. The type of your business (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](https://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](https://sam.gov) records must have an “Active” status for you to be able to access your records in [certify.SBA.gov](https://certify.sba.gov). Changes to records in [SAM.gov](https://sam.gov) can take up to 72 hours to transfer to [certify.SBA.gov](https://certify.sba.gov). **AFTER they have been activated by SAM.gov.**

Individual Contributor Questionnaire - What to Expect for Contributors

<https://sbaone.atlassian.net/wiki/spaces/CKB/pages/248774774/Individual+Contributor+Questionnaire+-+What+to+Expect+for+Contributors>

BEFORE:

Instructions

Follow the directions in your contributor email (from Certify) to access your Individual Contributor Questionnaire. You will need to **use the email address entered by the firm owner on the 8(a) application to create your account** - you cannot complete the application if you use a different email address to log into Certify.

After creating your account, you should be directed immediately to your dashboard (shown to the right). Click "Start Application" to complete your Contributor Questionnaire.

My Dashboard

8(a) Business Development Program

Type	Status
Start Application	

Having Trouble?

If you are not immediately directed to your dashboard upon creating your account and are asked for the business's DUNS, TIN, and MPIN, this is likely a timeout issue. **Do not enter the firm's information (DUNS, etc.)**, as the firm owner has already claimed the business - you will receive an error and be unable to proceed.

To resolve this, please contact the Certify Help Desk at help@certify.sba.gov to further review the issue. To expedite your issue, please include the information listed below - either you or the firm owner can submit the email to the Help Desk:

1. DUNS number for the firm,
2. a screenshot from the firm owner showing contributor name and email address on the 8(a) application,
3. confirmation of the contributor email address.

AFTER:

Individual Contributor Questionnaire - What to Expect for Contributors

Instructions

Follow the directions in your contributor email (from Certify) to access your Individual Contributor Questionnaire. You will need to **use the email address entered by the firm owner on the 8(a) application to create your account** - you cannot complete the application if you use a different email address to log into Certify.

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To resolve this, please submit a ticket to the Certify Help Portal at <https://certify.sba.gov/help> to further review the issue. To expedite your issue, please include the information listed below - either you or the firm owner can submit the ticket to the Help Desk:

1. UEI for the firm
2. a screenshot from the firm owner showing contributor name and email address on the 8(a) application,
3. confirmation of the contributor email address.

Create Your Certify Account

<https://sbaone.atlassian.net/wiki/spaces/CKB/pages/152240191/Create+Your+Certify+Account>

BEFORE:

Visit [certify.SBA.gov](https://certify.sba.gov) and click on the “Create an Account” button to begin the registration process. Only firm owners are allowed to create accounts on Certify. In order to link your [SAM.gov](https://sam.gov) profile to Certify, you will need your DUNS number, TIN number, EIN or SSN, MPIN (from [SAM.gov](https://sam.gov)) and firm structure (e.g. corporation, LLC, sole proprietorship) to register.

You will be asked to create a passphrase. The passphrase requirement is complex to protect the personal information you will upload to Certify. If you do not receive an email from Certify after you’ve created your account, check your spam folder and add certify@sba.gov to your contacts. The account creation email link expires after 24 hours.

AFTER:

Create Your Certify Account

Visit [certify.SBA.gov](https://certify.sba.gov) and click on the “Create an Account” button to begin the registration process. Only firm owners are allowed to create accounts on Certify. In order to link your [SAM.gov](https://sam.gov) profile to Certify, you will need your UEI, TIN (EIN or SSN, as indicated on the firm’s SAM.gov account), CAGE Code (if applicable), Bank Account Number (matched to the CAGE code from [SAM.gov](https://sam.gov)) and firm structure (e.g. corporation, LLC, sole proprietorship) to register.

You will be asked to create a passphrase. The passphrase requirement is complex to protect the personal information you will upload to Certify. If you do not receive an email from Certify after you’ve created your account, check your spam folder and add certify@sba.gov to your contacts. The account creation email link expires after 24 hours.

