

User Instructions for The Vendor Administrator Role

Temporary 8(a) BD Program Document Repository

V1.0

November 8, 2016

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Purpose of this Document

The purpose of this document is to provide guidance to business owners and their designees to electronically upload their 8(a) documents into certify.sba.gov as a temporary solution to meet new electronic upload requirements of the 8(a) BD program.

Learn how to:

1. Create a User ID
2. Select Your Role
3. Connect Your Business
4. Upload Your 8(a) BD Application Documents
5. Manage Employee Access

Section 1 - Create a User ID

1. On the certify.SBA.gov homepage, select the *Get Started* button.
2. Complete all required (*) fields in the New User Registration form.
 - a) First Name
 - b) Last Name
 - c) Email
 - d) Passphrase
 - e) Confirm Passphrase
3. Check *I Accept* and *I'm not a Robot* at the bottom of the New User Registration page. Select the *Submit* button.
4. Check your email inbox to locate the confirmation letter. Click on *Activate Account* in the email and log in.

A strong passphrase can be a unique phrase that you can easily remember. Add a space, special character and number for added security.

The passphrase must be showing "strong" in order to work.

Example: My Dog \$pot Digs Ho1es

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

- Check your spam, junk, and bulk mail folders: Sometimes our emails are blocked or filtered as spam by certain email providers or internet service providers (ISPs), so take a look in your spam, junk or bulk folders
- Add certify@sba.gov to your contacts and trusted user lists (see Appendix B, page 14)

Section 2 – Select Your Role

Vendor Administrators are representatives of small businesses that have the ability to manage the certification process for their firm. Vendor Administrators can also give access to other users to access and/or manage their business information. Unlike Vendor Administrators, Vendor Editors can only manage the certification process for a firm. They cannot manage which users can access a firm’s account.

If this is the first time you are registering your business, select *“Vendor Admin for a business that is new to certify.SBA.gov”*. You will need to provide your DUNS Number, TIN, and MPIN to register your business.

If someone else has already registered your business, select either the “Vendor Admin” or “Vendor Editor” role for a business that already exists. You will need to provide the DUNS number in order to request access.

If your business is already registered in the system, select Vendor Admin or Vendor Editor

Welcome to certify.SBA.gov!

Request access

There are two roles that are available for a firm to manage SBA’s small business certifications. If this is the first time that your business is creating or updating a certification in this system, please select the Vendor Admin role below. There must be at least one Vendor Admin assigned to the account.

- Vendor Admin for a business that is new to certify.SBA.gov**
The Vendor Admin is authorized to create, edit, and update all necessary information on behalf of the business. In addition, the Vendor Admin can grant and manage system access to others within their business.
- Vendor Admin for a business that already exists in certify.SBA.gov**
The Vendor Admin is authorized to create, edit, and update all necessary information on behalf of the business. In addition, the Vendor Admin can grant and manage system access to others within their business.
- Vendor Editor for a business that already exists in certify.SBA.gov**
The Vendor Editor is authorized to create, edit and update all necessary information on behalf of the business. However, they cannot grant access to others in their business.

You are accessing a U.S. Government information system which is provided for U.S. Government-authorized use only. By submitting a request for access, you are confirming that you are authorized to represent your firm to access data in this system. Unauthorized or improper use of this system may result in disciplinary action, as well as civil and criminal penalties.

[Request access](#)

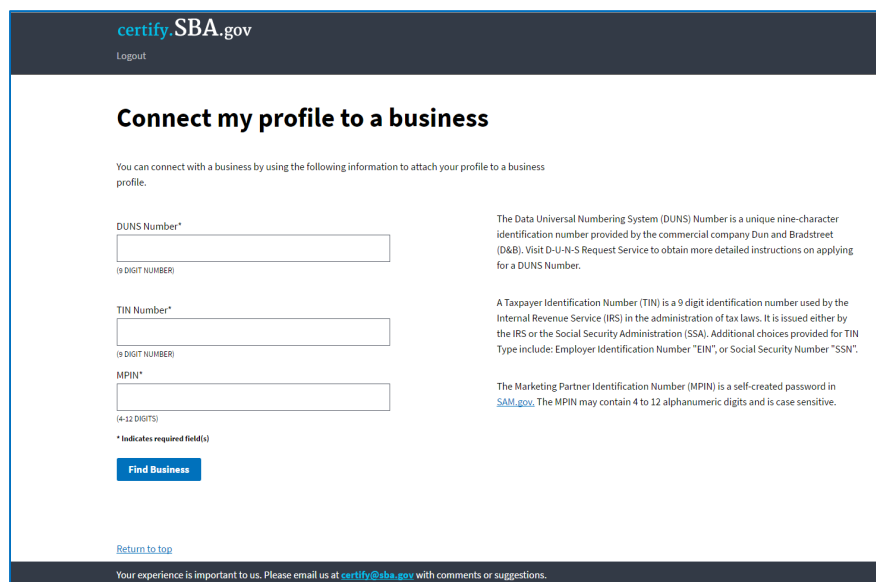
Section 3 – Connect Your Business

If this is the *first time you are registering your business*, you will be required to connect your profile to a business by entering your business information. Three pieces of information are required.

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). The choices provided for 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.



The screenshot shows a web form titled "Connect my profile to a business" on the certify.SBA.gov website. The form includes three input fields: "DUNS Number*" (9 DIGIT NUMBER), "TIN Number*" (9 DIGIT NUMBER), and "MPIN*" (4-12 DIGITS). Each field is accompanied by a text box explaining the requirement. A "Find Business" button is located below the fields. A footer note states: "Your experience is important to us. Please email us at certify@sba.gov with comments or suggestions."

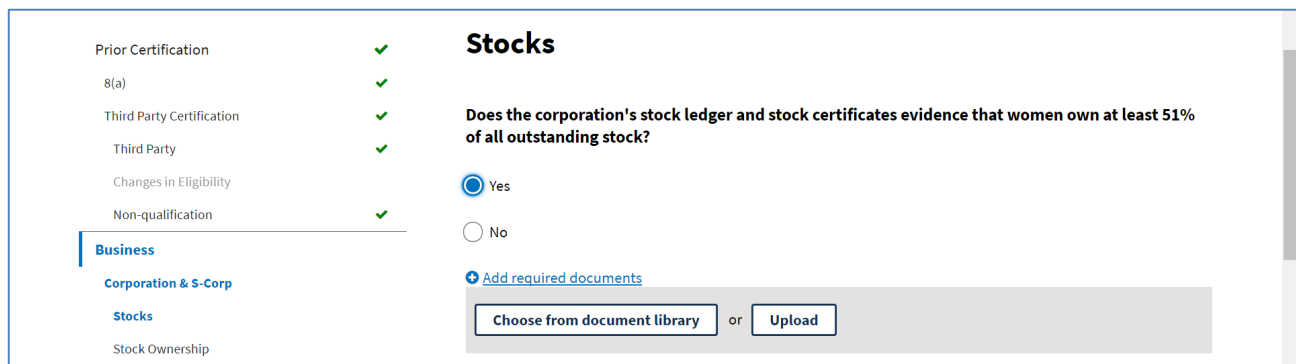
NOTE: Your records in SAM.gov must be in the “Active” status to be able to access your records in certify.SBA.gov. Any changes to records in SAM.gov can take up to 72 hours to transfer to certify.SBA.gov.

If you still cannot find your business, 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.

Section 4 – Upload Your 8(a) Application Documents

1. You will be prompted to answer a question about your business and then upload all of the documents required to apply for the 8(a) BD program.
2. Select *Add required documents* then select either *Choose from document library*, if you’ve already uploaded the document for a previous application, or *Upload*, if you are adding a new document



The screenshot shows a web interface with a checklist on the left and a 'Stocks' section on the right. The checklist includes: Prior Certification (checked), 8(a) (checked), Third Party Certification (checked), Third Party (checked), Changes in Eligibility, Non-qualification (checked), Business (selected), Corporation & S-Corp, Stocks, and Stock Ownership. The 'Stocks' section contains the question: 'Does the corporation's stock ledger and stock certificates evidence that women own at least 51% of all outstanding stock?' with radio buttons for 'Yes' (selected) and 'No'. Below the question is a link for 'Add required documents' and two buttons: 'Choose from document library' and 'Upload'.

Note: All files must be in PDF format.

Select *Upload*

- Select the *Choose a .pdf file* link or drag the document icon into the white box on the screen
- After you have added the file select the *Upload* button
- Add any comments

Note: It may take a few moments for your document to appear, the system performs virus scans on all documents. If you accidentally uploaded an incorrect document, select the Remove action link in the Edit column.

Documents to be added

| Name | Type | Date | Comments | Edit |
|--------------|--------------------|----------|----------|------------------------|
| minority.pdf | 8(a) Certification | 9/8/2016 | | Remove |

DETAILS

If your company has already been approved by the 8(a) Program and confirmed 51% ownership is a woman or an economically disadvantaged woman, you already qualify for the WOSB Program. Please upload or attach your original 8(a) Acceptance Letter and a copy of your most recent updated Annual 8(a) Letter, and click the "Save and Continue" button to complete the WOSB or EDWOSB self-certification process.

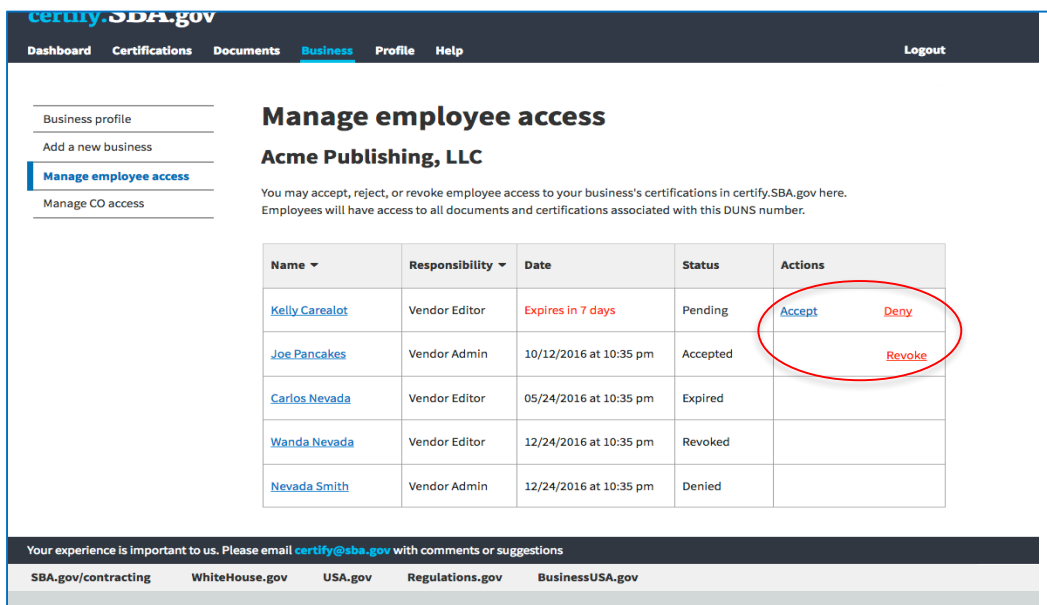
[Save and continue](#)

3. After uploading all of the documents, elect *Save and exit certify.sba.gov system.*

Section 5 – Manage Employee Access

Vendor Admins will receive a system generated email notification when an employee has requested a role to manage your business information. To accept, deny, or revoke access to your firm’s records, do the following.

1. Login to your certify.SBA.gov account
2. Select the *Business* tab on the top navigation bar
3. Select *Manage employee access* from the left navigation menu
4. In the Employee table, you can choose an action for each employee:
 - Accept or Reject – When an employee makes a request to be added to your business as an admin or editor, you can choose to either [Accept](#) or [Reject](#) this request
 - Revoke – You can [Revoke](#) an employee’s access to you certify.sba.gov account at any time by selecting [Revoke](#) in the Action column



certify.SBA.gov
 Dashboard Certifications Documents **Business** Profile Help Logout

Business profile
 Add a new business
Manage employee access
 Manage CO access

Manage employee access

Acme Publishing, LLC

You may accept, reject, or revoke employee access to your business's certifications in certify.SBA.gov here. Employees will have access to all documents and certifications associated with this DUNS number.

| Name | Responsibility | Date | Status | Actions |
|--------------------------------|----------------|------------------------|----------|---|
| Kelly Carealot | Vendor Editor | Expires in 7 days | Pending | Accept Deny |
| Joe Pancakes | Vendor Admin | 10/12/2016 at 10:35 pm | Accepted | Revoke |
| Carlos Nevada | Vendor Editor | 05/24/2016 at 10:35 pm | Expired | |
| Wanda Nevada | Vendor Editor | 12/24/2016 at 10:35 pm | Revoked | |
| Nevada Smith | Vendor Admin | 12/24/2016 at 10:35 pm | Denied | |

Your experience is important to us. Please email certify@sba.gov with comments or suggestions

[SBA.gov/contracting](#) [WhiteHouse.gov](#) [USA.gov](#) [Regulations.gov](#) [BusinessUSA.gov](#)

Appendix A – SBA Contacts

SBA Program Offices:

8(a) Business Development Program

8abdhotline@sba.gov

Certify.SBA.gov (technical questions only)

certify@sba.gov

Appendix B – 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 can be a unique phrase 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.

Example: My Dog \$pot Digs Ho1es

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
- 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.

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.

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 certify@sba.gov to your contacts list
2. In your email client, add certify@sba.gov "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
4. If you DO receive the email and the link does not work, copy the URL and paste it into a new web browser. Please make sure there are no added spaces at the end

NOTE: If you still do not receive an email, register your account with an email provider such as Google, Yahoo, AOL, Outlook, etc.