CERTS – Designation Form

This document is a short guide designed to support users of the CERTS Portal that represent multiple grantees or wish to designate new account users. The designation form allows account administrators to manage the access to their account and CERTS Portal documents.

1. Accessing the Designation Form

When a user represents multiple grantee accounts or if a primary user (account administrator) wishes to delegate the ability to fill out required portal documents, they must access the designation form.

1) After the user logs into the CERTS Portal with their ID.me credentials click in the upper left three white line icon.
2) Once the three white line icon has been clicked select “Account”.

3) The user will be redirected to a list of all accounts under their login. If a user represents multiple grantees, multiple accounts will be visible. To make designations for an account click on the account name.
2. Using the Designation Form

Once the user accesses the designation form, they can use it to add new users with specific access abilities. All new users will have to create ID.me credentials.

1) The primary user that created the account and grant application is automatically assigned the “Account Administrator” role. Only the account administrator will be able to use the designation form functionality.

2) After the user reads the instructions they will navigate to the “certification” tab. The user must read the certification, enter their name, and submit to be able to access functionality on the “Designation Form” tab.
3) Navigate to the designation form. With the designation form the account administrator can create new contacts for the selected account. If the user is not an account administrator there will be no role options in the “program-roles” section.

4) The role access are as follows: Account administrator – Ability to access designation form, fill out forms, and submit forms, Authorized Representative - Ability to fill out forms and submit forms, Point of Contact – Ability to fill out forms (not able to submit form).

5) Once the information is entered for a new contact and the complete button is clicked a record will be added to the contact list. The new user will then have to create an ID.me account to be able to access the CERTS Portal. For more information on ID.me registration click this link https://home.treasury.gov/system/files/136/ID.me-Instructions-for-CERTS-Portal.pdf