

Certify Quick Start Guide for Firms

Task	Instructions
Before Starting your 8(a) Application	Visit Certify.SBA.gov to utilize the Am I Eligible tool to help determine potential 8(a) eligibility. Next, download the application document checklist from the prepare section of certify.SBA.gov to gather all required documents. Save documents as PDF files with the naming convention: document title_year (ex. W2_2015).
Obtain a Data Universal Numbering System (DUNS) Number	Visit DUNS Request Service to apply for your free DUNS Number.
Register in the System for Award Management (SAM)	Visit SAM.gov and click “Create an Account” in the top right and proceed to create an Individual Account. SAM.gov will request your DUNS 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.
Create your Certify Account	<p>Visit 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 profile to Certify, you will need your DUNS number, TIN number, EIN or SSN, MPIN (from SAM.gov) and firm structure (i.e. corporation, LLC, entity-owned, sole proprietorship) to register.</p> <p>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.</p>

Certify Quick Start Guide for Firms

Task	Instructions
Fill out your Application	<p>Log into your Certify account. You will see several application choices, select the 8(a) application. You will immediately begin filling out your Eligibility information, then upon finishing this section you will be taken to your Application Overview where you can review and complete the other sections. Each section has various questions/prompts to help complete your application and upload documents.</p> <p>It is recommended that you start by adding additional relevant contributors after completing Eligibility; see “Add Contributors” below for details. After, complete your Individual Contributors section by selecting “Add or Update your DVD Information.” When finished, you will be returned to the Application Overview where you can complete the remaining sections (Business Ownership, Character, Potential for Success, and Control). As you complete each section, you must select "Save and Continue" to move to the next page.</p>
Make Edits to Application Sections	<p>Select the section title (ex. Individual Contributors) where you wish to make edits and make necessary changes. The edit will not be saved unless you continue through the section and click "Save and Continue."</p>
Add Contributors	<p>Open the Individual Contributors section to submit each individual contributors' information; the 8(a) application requires firms to invite individuals to fill out “contributor questionnaires,” where applicable. Individuals include spouses, other disadvantaged individuals, and non-disadvantaged individuals who own more than 10% of the company. Each will receive an email with instructions to fill in their information in Certify. The firm owner can see the status of the contributor's information and allow the owner to send reminders on the right side of the application page. <i>Note: To protect personal information, contributors do not have access to the firm owner's application information and contributor's (where multiple) cannot see each others' information in Certify.</i></p>

Certify Quick Start Guide for Firms

Task	Instructions
Upload and View Documents	<p>To Upload: You will be prompted to upload documents while filling out your application in Certify. Documents should be saved as PDF files with the naming convention: document title_year (ex. W2_2015). Files must be 25MB or less. Do not password protect any files.</p> <p>To View: When in your application, click the “Documents” tab found in the top navigation menu to view all uploaded documents. You will not be able to upload documents here.</p>
Delete Documents	<p>You <u>cannot</u> delete any documents that have been uploaded in Certify. However, you can go into the Documents tab to archive previously uploaded documents. Archived documents are still viewable by SBA but will no longer appear in the documents list for processing the application.</p>
Submit Your Completed Application	<p>Select “Sign and Submit” from the dashboard to send your application to SBA. Applications can only be submitted when all sections are complete, including additional contributor information. You will not be able to edit your application after submission unless SBA requests more information.</p>
Correspond with SBA after Submission	<p>Click the “Messages” tab found in the application menu on your application overview screen.</p>
Check the Status of Your Application	<p>Log into your Certify account and view the “Status” column for your application on the dashboard.</p>

Certify Quick Start Guide for Firms

Task	Instructions
<p>Revise an Application Returned During Screening</p>	<p>If your application is returned, you will receive an email notification. Log into Certify and access your application. Within the “Messages” tab, you will find a letter from your SBA Analyst documenting additional information they need from you in order to accept the application for processing. The entire application is now unlocked for editing; review each questionnaire to address the issues mentioned and upload new documents if necessary. You may send a message back to SBA for further clarification if needed. Firms will have 10 days to respond to SBA inquiries.</p>
<p>Revise an Application Returned During Processing</p>	<p>If your application has been accepted for processing and your SBA analyst has additional questions, the analyst can unlock sections of the application that require further clarification. Firms will receive separate messages per section returned that clarify what information needs to be added. Note: SBA has approximately 90 days to process a case and analysts expect prompt responses from firms with any clarifications sent through messages in order to keep the case open.</p>
<p>Respond to Your Determination Letter</p>	<p>If you receive an approval letter, SBA will send an acceptance package for you to sign. Once SBA receives the signed package, your 9 years in the 8(a) Business Development program begins.</p> <p>If you receive a decline letter, you may request reconsideration on the decision within 45 days. Click on your 8(a) application to visit the Application Overview page. This page shows you your options and provides a link to the decision letter that goes into more detail about why you were declined.</p>
<p>Reconsideration (coming soon)</p>	<p><i>SBA will work with firms to work through reconsideration until this feature is available in the Certify.</i></p>