

Annual Review Quick Start Guide

Task	Guidance
Prepare	<ol style="list-style-type: none"> 1. Download and complete the Annual Review Checklist from the Certify Knowledgebase. 2. You must submit an annual review within 30 days of the end of every Program Year
Add Contributors	<p>Submit each individual contributors' name and email address</p> <ol style="list-style-type: none"> a. This will send an invitation to each contributor to create an account to log into Certify and fill out their contributor questionnaire b. Owner can see the status of each contributor's questionnaire and are able to send reminders c. To protect personal information, contributors do not have access to the owner's application information and contributors (where multiple) cannot see each other's' information
Edit Application Sections	<p>Edits will not be saved unless you continue through the section and click "Save and Continue"</p>
Upload Documents	<ol style="list-style-type: none"> 1. Documents should be saved as PDF files with the naming convention: document title_year (ex. W2_2021) 2. Files must be 25MB or less 3. Do not password protect any files

<p>Archive Documents</p>	<ol style="list-style-type: none"> 1. Click the “Documents” link in the dark blue navigation bar at the top of the page 2. Click the trash can icon to archive a document 3. Archived documents remain viewable by SBA but no longer appear in the documents list for the application <p>You cannot delete documents that have been uploaded in Certify</p>
<p>Submit Your Completed Annual Review</p>	<ol style="list-style-type: none"> 1. Select “Sign and Submit” from the dashboard to send your annual review to SBA <ol style="list-style-type: none"> a. You application can only be submitted when all sections are complete, including additional contributor sections <p>You will not be able to edit your application after submission unless SBA requests more information</p>
<p>Send a Message to SBA</p>	<ol style="list-style-type: none"> 1. Click the “Messages” tab found in the application menu on your application overview screen <ol style="list-style-type: none"> a. You will be able to correspond with an SBA analyst as soon as it has been assigned
<p>Notifications from SBA</p>	<p>If the SBA analyst has questions or issues with your Annual Review, you will receive an email notification.</p> <ol style="list-style-type: none"> 1. Log into Certify to access your Annual Review. 2. Within the “Messages” tab you will find more information and actions that you need to take.
<p>Deficiency Letter</p>	<ol style="list-style-type: none"> 1. If your Annual Review is returned with a deficiency letter, you will receive an email notification. 2. Log into Certify 3. Read the deficiency letter within the Messages tab of Certify. 4. The letter will document additional information needed in order to have SBA process your Annual Review. 5. The entire Annual Review is now unlocked for editing. 6. Update questions in each section requiring edits/clarification, as noted in



	<p>the letter.</p> <ul style="list-style-type: none"> a. Review each section/questionnaire to address the issues and upload new documents if necessary. <p>7. You may send a message back to SBA for further clarification if needed.</p> <p>Firms have 10 days to complete their responses to the deficiency letter.</p>
Letter of Intent Received	<ul style="list-style-type: none"> 1. If you receive a letter of intent to terminate from SBA, the letter will document additional information or actions needed. 2. You have 30 days to respond by submitting the necessary information requested in the letter within your Annual Review questionnaires. <ul style="list-style-type: none"> a. If you do not upload the necessary information within 30 days, at that time SBA will begin proceedings for the Notice of Termination to end your firm’s involvement in the 8(a) program. 3. You may send a message back to SBA within the Messages tab for further clarification.
Retain Letter Received	<p>Firms that complete all the requirements to stay eligible for the 8(a) program will be retained at the end of their Annual Review processing. If you receive a Retain letter, SBA has confirmed that your firm will remain in the 8(a) program.</p> <p>Your status on the dashboard will also read “Retained” once your Annual Review has been fully processed and accepted.</p>
Request Withdrawal from 8(a) Program	<p>If you wish to withdraw from the 8(a) program, you are still required to submit your Annual Review until SBA has received your signed Voluntary Withdrawal form.</p> <p>Email your analyst to begin the voluntary withdrawal process.</p>

