Moderator: Ladies and gentlemen, welcome and thank you for joining today's overview of the 8(a) Application Update for Firms. Please note that all participant lines will be muted until the Q&A portion of the presentation. We will provide you with instructions on how to ask a verbal question, at that time.

However, you are welcome to submit written questions during the presentation, and these will also be addressed during Q&A. Please select the Participants menu at the top of your screen, and opt to send note to, "all presenters." If you are logged in using the web-based application, use the Notes tab on the bottom right-hand side of your screen and address your question to "all moderators."

With that, I will turn the call over to Francine Morris, Program Manager.

Francine: Hello everyone, good afternoon. This is Francine Morris and I am the Program Manager for the certify.SBA.gov project that we are rolling out for our Government Contracting and Business Development program. I want to welcome all of our resource partners especially. And thank you all for all the support that you offer SBA with the small business community. We appreciate, always, to have you and want to roll out the information and give you the information to help our small business community for future use.

I am going to get us started with Rick. And Rick is – this is a collaborative effort between the Small Business Administration, OMB US Digital Services Group, our contractor support – but also, those out in the field that continually work with us to try and develop a system that is good for everyone. So we are really excited about the project. And we're going to get going with more detail and offer you some materials to be used to support as far as getting the information out to our firms and Rick is going to get us started.

So without further ado, we are just going to move forward with Rick Lee. And you will have an opportunity for questions at the end of the presentation. Rick?

Rick: Thanks, Francine.   As Francine said, my name is Rick Lee and I'm with the United States Digital Service. We are part of OMB and we're here helping SBA get Certify.gov off the ground. I'm the product owner for this, so if you have any complaints or comments or kudos, feel free to send them our way.

So the purpose of this today is multifold. Primarily we want to make sure that you guys are informed of what we're doing and bring you up to speed on some of the new expectations that SBA will have of firms as they apply for GCBD programs.

So the deck that I am sharing right now will be made available to you in coming days, and also available online, so that you can use it when you speak to firms and help guide them through the new application process and how to use Certify.

So what is Certify? I'm not sure how much you guys are familiar with this, but Certify is SBA's initiative for modernizing the GCBD application process for the WOSB program (women-owned small business), EDWOSB, the all small-mentor-protégé program, the 8(a) program, and the HUBZone program.

As you know, as you guys are all well aware, these programs have different application methodologies - some are even on paper. The 8(a) program currently uses the BDMIS system, and firms and partners such as yourself need to print those applications out and send them in.

So what are we doing? We are primarily stopping that. We want to reduce the burden on firms. We want to reduce the burden on dedicated partners such as yourselves. We're trying to save everybody some money and create efficiencies for government.

So the first step in the Certify process is to be able to collect applications completely online. So that includes capturing all the data that is required by firms in the application process, as well as recording documentation that must be submitted.

SBA has gone to great lengths to ensure that things like wet signatures are no longer necessary, and we are able to make those insertions digitally. This also helps the servicing of these firms as they become participants; as they transition from applicants to participants. All files, instead of being mailed to the district offices are now going to be able to be simply digitally assigned to those offices, creating additional efficiencies.

So how are we doing that? One of the goals of Certify, long-term, is to enable the reuse of information. So if I were to apply for the 8(a) program, the technology can evaluate my 8(a) application and apply what is relevant to HUBZone and to WOSB and MPP, so I don't have to continuously fill out duplicate responses. All of the supporting documentation that I am uploading – nearly all of it is reusable for other programs. So instead of sending my tax forms twice, I can use the tax returns that I have already uploaded to Certify to apply for another program.

On the internal side of this, we are also bringing more transparency and visibility into all applicants throughout the GCBD programs, and ultimately throughout SBA. We want to make sure that if I am a HUBZone analyst, for instance, and say I get an application from someone who is already an 8(a) participant, I want to be able to go in and see all of their participation records – from conversations they've had with analysts to previous submissions that they have made.

One of the really important components that we are introducing in this next release – and I can't stress how important this is, enough – we are creating the ability for firms to have the messaging form to contact the SBA and have the SBA contact them back that is contained within the system.

So one of the primary, absolutely critical, I should say, operating principles of our efforts is to secure the personally identifiable information of all of our firms. And as you know, SBA collects a lot of personally identifiable information. Email is inherently insecure; your particular organization's email may be secured, SBA's may be secured, but as emails transit from the variety of infrastructures that the firms use in SBA, there's a lot of opportunities for this personally identifiable information to become compromised. So we've created a secured messaging form, and I will go into that in a little more depth later in the presentation.

So what are the features of Certify? Generally speaking, everything in Certify is aggregated to a level of the application, right now. We want this to be as easy as possible for the firms to navigate through and understand what it is that they are applying for, and how the application process works. There's a number of features that go along with filling out an application that augment this experience and functionality for both the firm and for the analysts, once the application has been submitted.

One of those is a documents library. So Certify will contain a repository for PDF documents that are categorized and labeled based on the application question that is being answered.

I spoke of messages already that will replace email within SBA. We are providing also, a number of notifications. We realize that a lot of firms only come into this system right now, once a year, when they have to do, say, an annual update. We want to change that. We want to make this something that is a communication channel that will help firms and help analysts engage in business development activities on a more regular basis.

So, to do that, we are notifying firms any time something occurs in the system that requires their action. So if I am a firm and I receive a message, again email notification that, that message has been sent to me. And if I happen to be in Certify, I'll also get a notification inside the Certify application that tells me that there is something that I need to do.

Again, in the spirit of security, we've taken a look at how personally identifiable information is handled within SBA in the application process. And one of the features that we have added is the ability for contributors – individual contributors, such as the DVD spouses or 10% owners in the case of 8(a) – to submit their information to SBA with their own user account, so that we can better protect the information that they are submitting.

What's the most common thing that you're going to see? You're going to see the questionnaires. So what we've done in this modernization process, is that we have re-envisioned how the questionnaires work and appear. We've replaced this idea of numbered forms that SBA has used traditionally, and we've broken those down into eligibility criteria.

And we did this for a number of reasons. One is, we can better reuse the questions and responses across multiple programs, that way. And also we are able to provide some additional context around the questions that are being asked. So, the eligibility criteria is how we have broken these questions down and we've gone through each form from the 8(a) process, and actually WOSB and MPP as well, and taken certain questions off and relocated them into the eligibility criteria to which they are most relevant.

We realize some questions and some supporting documentation will be relevant for multiple areas of the application and multiple eligibility criteria. But the HQ staff here has done a really solid job of taking a deep dive look into how each of these questions pertain to each applicant's submission. So I think we have a really solid way of looking at this and we think it will be easier for firms, as well as resource partners such as yourselves, moving forward.

I mentioned the document library. So one of the key components for any application for GCBD is supporting documentation. We wanted to find a way to make these documents more usable. So in the questionnaires themselves, when required, the firm won't be able to jump between questions without uploading the

required documentation. That does a number of things. It encourages – actually it enforces – more complete application submissions.

But it also allows us to categorize each of these document uploads, based on how they apply. So in the case of what you're seeing on the screen right now, these particular documents apply to eligibility criteria. But we also have, I think 50 or 60, different document types that reflect the question that is being answered. So if I'm being asked a question about citizenship, for instance, as a firm – when I am prompted to upload a document – there will only be two choices that I can select. One may be a scan of my passport and the other might be a birth certificate.

That helps the analysts as they go through and review. And it also helps the firms as they apply for other programs, or if they embark on completing a compliance review, such as the 8(a) annual update. They'll be able to find these documents easily and apply them as necessary.

Again, talking about the messaging service. So all messages between the firms and the SBA will now occur inside this messaging service. Each of the messages relates to a specific application right now. We're working on, for the future, creating firm level messages, so that we provide a little bit broader context for messages, and again, helping that business development function. But for the time being, all the messages relate specifically to an application.

A firm can only submit a message once the application has been assigned. So if they hit submit on their application, and in the time it takes for SBA to assign that case, they won't be able to send the message. But as soon as a case is assigned, they will be able to send a message to their analyst, request additional information, and the analysts will be able to request additional information from them and provide any additional guidance that is necessary to complete the application.

Again, in that protecting PII vein, we created functionality to allow these individuals that need to contribute information to do so, by using their own username. So in this situation – this has to do with the delegation of authority over personally identifiable information.

When SBA did paper forms – or issued paper forms – it was incumbent upon the firm to control who saw what PII in an application. Moving into a digital system, it's now incumbent upon SBA to protect the PII of each of the individuals that are contributing. So, in this case, from a pragmatic perspective, each individual will receive an invitation to contribute based on a selection of type of contributor that

they are. So in this case we are saying it is a non-disadvantaged individual or the spouse of a disadvantaged individual – and they receive only the questions they are required to fill out. They are not going to receive just a blank IND that they have to figure out and navigate through etc. etc.

The visibility of this information is also restricted. So, a firm owner who might fill out what was previously known as the 1010-biz – (side chat - you know, you really need to turn that into a symbol of some sort. The form "formally known as.")

They will not be able to see the contributing individual's information, but they will be able to see the status of that individuals application. So they will also be able to prompt them. If, say they have finished their form of the business application, as well as their individual contributors' form. They need to prompt, they can send reminders, they can remove individuals, if for any reason, they need to during the application process. And they can add additional individuals as well.

Every firm has a dashboard. Again, one of the things that we are trying to do is encourage cross-pollination between programs, and encourage firms to apply for multiple programs, and any program that they happen to be eligible for. So we provide all of their information in the format of a dashboard, that's sort of their starting point. You can sort of think of it as a portal for them to enter into the Certify ecosystem.

From here, they will be able to identify their applications from any program. They will be able to identify any program actions that are required, such as a pending annual update that is due – that will appear here, and they will be able to access it. They will also be able to see their firm details.

One note for you guys is that we pull all of these firm details, with the exception of business structure, from SAM.gov. So the reason for that is from a digital perspective, we are providing and ensuring continuity of the information that the government is using in the contracting process. So there may be, and we have run into this, in the past with previously operationalized programs – some confusion on the firm's side about how they manage that information.

A lot of firms need to change their address or change their phone number, etc. and they don't do that in Certify. They will actually do that in SAM and then SAM will automatically pass it through to Certify. And generally, that happens within

three days. Sometimes it takes a weekend. And they can re-log into Certify and validate their changes.

Ok, so what does this experience look like with more specificity for a firm? The first tool that we are providing is something that you guys might find really helpful in the long run as you start to engage with the firm who is just expressing interest in GCBD programs – and that's our "Am I Eligible" tool, which you can access and the firm can access from the certify.SBA.gov home page. The "Am I Eligible" tool, asks a number of series of qualifying questions that relate to a variety of programs. And based on the answers the firm provides, we give them - the output is a list of programs that they may be eligible for.

I want to stress this: this is not guaranteeing eligibility. This is saying, if you answered in this fashion, you *might* be eligible, and it might be worth your while to apply.

So how does this firm apply? The first thing they need to do is visit Certify and register themselves and their business. To do that, the firm will click on the orange "Get Started" link. And before they do that, they need to have – we need to make sure they have their DUNS number, they need to be registered in SAM - but not just registered in SAM - their SAM record also has to be active.

If the firm goes into SAM and sets up their account, generally those accounts – I think the term SAM uses is "pending," while they do their reviews. And a firm in a pending state can't actually register in Certify; they will need to wait until that status is active. And then from there, they simply need to associate their business. So as I said before, we pull all the information about the firm from SAM.gov, so if a firm is in SAM.gov, with an active record – we actually have their information already in Certify.

The firm owner – and I should stress that – the firm <u>owner</u>, simply needs to associate that account, their user account, with that firm using a DUNS number, and a MPIN and a TIN or an EIN.

Once they have created the association between themselves and their user account, they will log back in and the first thing that they will see is their dashboard. The dashboard gives them the opportunity to start an application for any number of programs. Well – not any number, but WOSB, MPP, HUBZone or 8(a).

So we talked a little bit about some of the structure here, and that applies to precisely how the firm will work through this application. In the case of 8(a), we force them to go through the eligibility – the basic eligibility requirements - first. So that will be the first thing that they see. And those are the top disqualifying questions.

And as they go through that process, and if a firm answers in a way that would disqualify them from the program, we feed them a warning that says, "based on your response, you probably are not eligible for the program." We don't, however, stop them from applying. So if they answer that they are not a US citizen – and this is actually a good example – you can pretty much guarantee that they are not going to be accepted into the program. But for statutory reasons, we have to allow them to apply, anyway. So that is something that you guys should be aware of.

The next step, generally – and there will be a much more detailed training on this, later. But the next step, generally, is to add your contributors. So if you are, say, a sole proprietor you would only need to fill out for 8(a), for example, the DVD questionnaire. If you are a larger firm, or have multiple partners, or you are married – you would add your spouse in, you would add those partners in, and then they can get started on their applications separately.

The application, when it is initially started, is in what we call draft mode – meaning that it is 100% editable by the firm's side participants in the application. SBA analysts can go in and view an application in progress, but they can't make any changes to it; it is view-only. And we provide that for accountability reasons. But we also provide that view, so if there is any additional help that is required, you can see what the applicant is looking at.

Once an application is submitted, we then lock that application from the firm. No more additional information can be added to it unless requested specifically by an analyst. And at this point, the firm will be provided with the status on each of the sections and their overall application, in terms of whether or not it has been submitted, who is responsible for the next step, etc.

And at this point, you should instruct firms that they should be aware that they may be getting emails with a request for additional information or for needed changes to the information in the application.

And the system saves the status of the application. So, it's important to let them know, too, that they don't need to complete the entire application in one shot. The

sections within the application need to be completed, eventually, but the system saves their progress. So, for instance, if I am in Eligibility, and I answer six of 10 questions – and I have to go pick up my kid from soccer – I can log out of Certify. My progress will be saved. And when I log back in, and click on Eligibility – it will take me to question #6.

There's one note about that, that I want to bring to your attention. And that is that, to save requires that they hit the save button at the bottom of each screen. That doesn't happen if they just fill out the field in an associated document, and log out. That particular screen won't be saved. So I just want to point that out.

So what can a firm expect as they go through the process? A lot of this, I'm sure you are incredibly familiar with already, but I'm going to go through it anyway. So, the number of days to go through application screening. So the screening process of SBA is all about ensuring that the application that has been submitted, can be evaluated properly, and SBA has 15 days to conduct that evaluation. At the end of that 15 days, they either need to be asking for additional information from the firm or moving the application into processing.

Again, another statutory requirement - that I think that everyone on this call is probably familiar with – the 90 days that SBA has to process the application and approve or decline the application.

If a firm happens to be declined, which I am sure will occur, the firm has 45 days to appeal or to request reconsideration of their 8(a) application. And that 45 days actually begins when the Associate Administrator makes the determination of approval or decline. So the system will send a notification to these firms, at that time, but they should be on the lookout for that. Because if they miss it, or don't log in, there will be additional notifications, but the 45 days are counting down.

So when is this all going into effect? As of November 15, the Certify platform will be accepting applications from firms. This will be the 8(a) initial application only. We are going to be working through a transition phase of incorporating annual updates into the process, as well. That will occur in January 2017 (sic) [*Editor's Note: The correct date is January 2018.*]. For anyone requesting more information about – if they need details about how this is going to work – they can contact Francine Morris, Van Tran, or email me and we will be glad to give you some details about how the transition from BDMIS to Certify is going to go.

One thing that is important to note is that BDMIS is not going away, right away. So what the program is asked if a firm has started an application before October 1, that they have completed and submitted that application in BDMIS by the 15th of October – but annual updates, and whatnot, will continue to be completed in BDMIS until January 5.

So between October 1 and November 14, we are going to put a pause on the initial application process. There are a number of reasons for this. One – we want to clear up the backlog in BDMIS as much as possible so that we can make Certify as efficient as possible as it launches. Another advantage to this, is that we can phase out these applications, as opposed to just cutting things off. We know the application can be long, we want to make sure that firms have enough time to get through this.

So, at this point, I want to turn this over to Van Tran, who is going to tell you about some of the initial training that you can expect in the coming weeks.

Van: Thanks, Rick. So what you're looking at is the list of the training dates that's coming up after today. We are providing the training to you, as the trainer, so that you can turn around and train the firms regarding Certify and how to apply, and all good information. And then you have the same session for tomorrow. It's a repeat of today's session.

And then later on in November, early November, before the launch – you will get a prototype of the actual system, going through step-by-step and you will see it as it is going to be launched November 15. So you will get an opportunity to see the prototype of the initial application. And then we are going to walk the firm, as well… to train them on… and you are welcome to participate on that training.

And then, as Rick indicated, the annual review will be launched in January 2018. And then the same thing. We will do the same session, Train the Trainer, on the annual review updates and the features, and what they, the firms, can see, and all of that. So you can turn around and help a specific firm, if they have questions. And then the same thing – prototype and walking the 8(a) firm on the new system, Certify, before the launch, which is in January 2018.

When we sent out this presentation, I'm actually going to delete this slide. You should all receive an Excel spreadsheet. If you don't, email Francine or myself. And we will send you that spreadsheet; for the purpose of sharing the presentation to the firm we want to delete this slide. And that's it for me, Rick.

Rick: So, at this point, I think we want to open it up to questions. And I think our moderator is going to help us with this.

Moderator: And ladies and gentlemen, if at this time you wish to ask a verbal question, please press #2 on your telephone keypad. And for voiceover computer users, in the top toolbar. You will receive notification when your line is unmuted. And at that time please then state your name and question. As a reminder, you can send in a written question, as well, please select the Participants menu at the top of your screen and opt to send note to all presenters. And if you are logged in using the web-based application, use the notes tab on the bottom right hand side of your screen and address your question to all moderators.

And it looks like we have received a couple of questions through Chat. The first question being – can this PowerPoint be printed?

Rick: Yes, the PowerPoint is printable. We'll probably send it to you digitally and you can print it out in your office.

Moderator: And the next question – will view-only mode to be given to the district office BOS?

Rick: It will, actually. One of the features of Certify, is that all analysts will be able to view-only from any program. Oh additionally, let me take this on, too, while we have this topic, as it's relevant. Not only will it be viewable, but when the 8(a) CODS analyst begins evaluating an application in Screening, we require that they assign the district office to which the case, if approved, will be assigned. So that district office will then also receive notifications about major milestones related to that particular application.

Moderator: And, the next question – was the date supposed to be January 2018, and not January 2017?

Rick: Yes, it was. We will update that, thank you very much.

Moderator: And the next question – will the BOS's be able to gain access to Certify?

Rick: Yes. I'm not sure about the date, but yes. So ultimately what will happen is, we have an access workflow set up. So all the BOS's will be able to click on a "Get Started" link - something like that. And as a federal SBA employee, you will have to set up a MAX.gov account.

The reason for that is, again, in the spirit of protecting PII, we use PIV authentication; so associating your SBA PIV with a MAX.gov account helps us do that. Once you have that set up, which you can do pretty much instantly, you will go into Certify, set up your user account, and you will be asked what sort of access you want or need.

You will select the business unit that you work in – so if you work in a district office, you would select district office. You will select the location of your district office. You will select whether you are a supervisor or an analyst. And you will select any program affiliation that you may have. That will then be submitted to your particular supervisor, who will approve or decline that request.

Moderator: And the next question – Will there be a login for the PTACs that can be utilized in learning the system and helping client companies?

Rick: So we are going to be working on that. That is actually one limitation of the system, as it is going to be launched. So as it stands right now, we are only able to associate one email address with one firm. And we realize that, that creates a big problem for you guys. So that is on our list of things to fix very soon after launch. And I don't have dates for you, specifically, but we will be working quickly to resolve that.

Moderator: And our next question – will BOS only be available for 8(a), or can we assist women-owned business?

Van: Hi, this is Van. Of course, if a small business is coming and asking for assistance with a WOSB program, you can certainly help the firms in the WOSB program. Amy Kim is the program manager, and she can assist you and provide you questions. As you know, WOSB is self-certified so there is no certification process yet. So when WOSB has an essential certification process and I'm sure WOSB will provide you more information in terms of helping the WOSB firm to set up an account in Certify, and all of that. I don't see why you are not able to help the firm.

Rick: And you may or may not be aware that WOSB and MPP are currently in Certify. So you will be able to view those firms' records and help the firm apply by even reviewing what's in there, now… when we get the PTACs login set up.

Moderator: And our next question – have all our resource partners received information regarding today's and tomorrow's webinar?

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Francine: We hope so. We pushed out the information and reminders. We followed up on those reminders and so we are hoping that tomorrow is going to be a replication of today, hopefully those that did not get on today's call will make tomorrow's call.

Van: And also the webinar training today, and tomorrow, will be recorded and we will post this webinar on our website, as well.

Moderator: And the next question – is the MAX.gov account only for government employees, or will the PTACs be able to use this account, as well?

Rick: So that is specifically for MAX.gov, I'm sorry - government employees. The PTACs will not need to do that. The PTAC users will be able to just sign in with a username and password.

Moderator: And once again, if you would like to ask a question, press #2 on your telephone keypad and you will be placed into the question queue. And for voiceover computer users, you can select the raised hand emoticon from the top toolbar. And once again, as a reminder, you can also submit a written question, by selecting the Participants menu at the top of your screen and opt to send note to all presenters. And for web-based applications, use the notes tab on the bottom right-hand side of your screen and address your question to all moderators.

            And it looks like we have received another question – would the BOS's also have to login as an analyst? Will there be another access created for us?

Rick: So, in this system, the way the system works, a BOS is the analyst… is the analyst role. We leveled that to analyst, not at all to diminish the value of BOS, but there is a variety of different types of users in the system, that are simply called BOS, so we wanted to make sure that we sort of leveled that label.

Van: And just to add to that comment, remember that, Certify is an enterprise system. So it will be used by WOSB, HUBZone, 8(a), All-Small. And we are trying to use the terminology to be consistent across the board. So there is BOS in 8(a), and in the field, there is a BOS. And there is an analyst in WOSB. So we tried to keep the terminology consistent across all programs.

Moderator: And we did receive another question – Will an updated document checklist be made available?

Rick: Yes. So, our communications and training teams, are working on creating an updated checklist for 8(a) specifically, and other programs will be coming, following that.

Moderator: And our next question – just to clarify, for firms who have started their applications in BDMIS, but have not yet submitted, do they have until 10/15 to submit? Or 11/14?

Rick: 10/15 is the date that they have to submit.

Francine: And feel free to reach out to us. We're trying to do everything possible to help those firms, as well, get that information in. But 10/15 is the date we need to cut off.

           And one thing I also want to bring up, since we were bringing up BDMIS – if you all could help us – we want you to realize that if you get any questions from the firms, that if they still can submit their annual update, or anything – you know, annual updates are still permissible in BDMIS. That system is not going away, right now. We are not decommissioning that system because we still have to roll out our January 15 annual review and annual update throughout that system.

           So BDMIS will still be functional. You just will not be able to create a GLS login to get into BDMIS. So those firms that already have – that are in BDMIS right now – they have their user ID, they will be able to continue to access BDMIS and submit their application. So there will be no issues. For those firms that are already in the program, they will be able to continuously submit their annual update into BDMIS. So there is no impact, as of now, to those firms.

Van: And if you get questions from firms that are in the process of submitting an application and they want feedback on whether they should wait or complete, we recommend they should wait. Because Certify, for the 8(a) program, it has a streamlined application process. So if they decide to go through BDMIS, they have to complete and provide a lot of documents, right? And in Certify as of November 15th has the streamlined process. So I would encourage them just to wait for November 15. And uploading and the answers like Rick was going through in the demo – yes, no, upload - instead of all the forms and filling out all this information.

Moderator: And our next question – can a BOS start applying for access? Or should we wait?

Rick: You should wait. We will send out a notification as soon as we are ready to start accepting applications for access.

Van: I just want to add on. So November 15 is for the application. So right now, my team, my CODS, have access to Certify. I just need you guys, the field BOS - I just need you, you have to be patient, a little bit after November 15. Because we want firms that are applying and once we get the SBA employees access to Certify, they know, that this is amazing. So just be patient and Rick and Francine will definitely notify when you guys in the field can have access and look around in the system.

Moderator: And our next question – to confirm, all numbered forms will no longer be required, correct?

Rick: So that's not 100% correct. So a little bit about this. The Certify platform is being developed in what we call – I'm not going to bore you with the details – but what we call an agile process. Meaning that we start with a minimal level of functionality, a minimal viable product as what we call it.

               And then we build on that, using input from people such as yourselves, firms, analysts. And we do that so that we can maximize the cost of developing this application and maximize the output and the experience that we're creating.

               So what we have done for this minimal viable product, is we have taken the most common forms for 8(a) – that the largest number of firms will use. So the 1010-biz, the 1010-IND, the 413, the 912, and they have all been incorporated. Some of the less common forms, such as a fingerprint card or an entity-owned firm forms, the ANC, etc. - those will still be required. And we are providing those in PDF, and they can be downloaded from Certify, completed right there and then re-uploaded into Certify.

               So they don't need to be submitted by paper, Certify will still accommodate them. But it's a slightly different process. And we'll be working over the next several months to incorporate those as well. And you will receive guidance, too, on how this works.

Moderator: And our next question – will DSBS be moved to Certify? And when?

Rick: Great question. Yes, so we aspire to be absorbing DSBS as soon as possible. But I think that we are probably looking at another year, before we can actually get it incorporated into Certify. But we have big plans for DSBS.

Francine: Ultimately, the Certify you see in the first slide – it says the Certify system is going to be a one-stop shop. So all of these legacy systems that we have – E8(a), BDMIS, HCTS – all of the systems, including DSBS, will ultimately be one system, which will be the certify.SBA.gov system. So this will become the system of record for all of our SBA government contracting business development programs and systems.

Moderator: And our next question – Claude would provide an updated 8(a) application pipeline report. Any way, to get this again? The last one was August 29.

Van: So Rick indicated earlier, when an application comes in, the BOS or the analyst will designate a district office. So the district office, the BOS in the field would get a copy if the 8(a) application is incomplete and we return it – you get a copy of the letter. And also, if the firm is declined, you will get a copy of the decline letter.

So as Certify is working, they will be able to build this report – the status of an 8(a) application in the district office. It's one of the functions they are working on down the road.

Claude is out on extended leave. I am going to ask Matt to pull it. But since we are already in October, and we are trying to get them to apply in Certify, we are trying to clean up the rest of the applications in-house. I ask that you wait and then we will provide you the application pipeline report, down the road. So for now, it's a pause period for now. But we definitely will resume that.

Moderator: And our next question – if a firm that is currently in the program forgets their GLS password, who should they contact?

Francine: They can still submit for their password reset. It should be no issue. That is, if they are current – if they have a user ID already in GLS. If they did not, they will not be able to create a user ID. But if it's a forget password, they should be able to submit to the helpdesk. If not, you can submit to the Certify Help desk, and we'll take care of it. We'll make sure that that can get taken care of.

Moderator: And at this time, there are no other questions in the queue.

Rick: Well, thank you all very much for attending. If you have colleagues that you believe would benefit from this that were not able to attend, we will be repeating this again tomorrow. If you did not get an invite, or if you think they may not

have gotten an invite, or you need us to send an invite to somebody else, please let us know. I'm sure you can respond to the email you got initially.

Francine: And I would like to say, again, I want to end this like I started it. Again, this is a collaborative effort to develop the system. This is going to be what I call "our" system – and that's everybody within SBA, and this includes our resource partners for government contracting and business development. You know, your feedback is so important to us. So if there is something that you maybe feel would be beneficial, that the system would be able to offer you, that would help you support the firms, assist the firms in getting certified or working through to getting their application submitted – we would really appreciate that feedback. So please feel free to offer that information up to us. Do you have that email [*Editor's Note: question posed to Rick.*]?

Rick: No, I don't. But how about I put up a suggestion box?

Francine: That would be great. We are going to get you a suggestion box. That's what's going on, right now, that you can submit the feedback to.

Rick: Here we go. So, this link will take you to a page that will allow you to submit whatever suggestions you have for us. Again, we are working very hard, as Francine said, to collect as much feedback as possible. I want to send this out to the group. Can the moderator help me with this?

Francine: You can just put it up. We can always shoot it out later.

Rick: Actually, I want to send something out by Chat. I think that maybe this is what I want to do.

Moderator: At the top of your screen, you will see the Participants icon, and once you click that option, you will see on the drop-down menu "send note to all."

Rick: I only see send note to presenters. Public note? There you go. And we really look forward to hearing from you.

Moderator: And, there it is. [*Editor's Note: The link is* https://certify.ideas.aha.io/ideas]

Francine: Excellent. Please feel free to send in any suggestions. Trust me when I say that we read them, we listen to them, we see how they fit, and we try to work with them and getting the system to work for everyone.

Moderator: And we did receive another question. Will there be capability to access tax documents directly from the IRS in the program?

Rick: … (crosstalk-inaudible)… No, that's an IRS thing. We're not actually able to connect into that. And I believe that in the streamlined process we are not asking for that anymore, correct?

Van: I think the question is are you trying to access an individual tax information, the 1040 or the 1120…? Right now, Certify, we can't, we have to work with IRS. Knowing the IRS, I don't know how willingly they are going to give us that information…

Rick: We've actually looked into this already. We've already asked people at IRS, and they said no.

Francine: They said we could not. We've done this already. They are not ready for us to do something like that.

Van: Good, so you hear from them, we tried.

Rick: And we will continue to try. I see one other comment that says – I think you would help us by putting out a video using some sample companies. So, that's actually something the training team is working on right now. As you progress through these trainings you will be given links to repositories that contain training information for firms, as well as some for I believe, resource partners and firms. That's coming, and that's a great suggestion.

Francine: So this was the first of a high level overview of trying to drill down to give you some information on what we are doing, why we're doing it, and how we are doing it. And then, as you see the training plan, you'll get more hands-on training. So you will see how the system actually works, walking through an application and seeing how it is processed. So there will be more hands-on in the future.

[End of Recording]