Application Quick Start Guide

Task	Guidance
Prepare	1. Visit **certify.SBA.gov** to utilize the Should I Apply? tool 2. Download and complete the 8(a) Initial Application Document Checklist from **Certify Knowledge Base** 3. Reach out to your **local resource partners** to learn more about the 8(a) Business Development Program
Register in SAM	1. Visit **SAM.gov** and click "Create an Account" in the top right to create an Individual Account 2. Your Unique Entity ID (UEI) is assigned when you register in **SAM.gov**, and is located on your entity registration record 3. After you have submitted your information, your account must be approved in SAM to apply in Certify; the approval process can take up to 72 hours
Create your Certify Account	1. Only owners are permitted to create accounts in Certify 2. You will need your UEI number, TIN number, EIN or SSN, MPIN and company structure (e.g., corporation, LLC, sole proprietorship) to register and link your **SAM.gov**, profile to Certify 3. 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
Send a Message to SBA	Click the "Messages" tab found in the application menu on your application overview screen You will be able to correspond with an SBA analyst as soon as it has been assigned

Add Contributors	Submit each individual contributors' name and email address to send an invitation to create an account and complete their section. Owner can see the status of each contributor's questionnaire and are able to send reminders a. 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	Edits will not be saved unless you continue through the section and click "Save and Continue"
Upload Documents	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
Submit Your Completed Application	1. Select "Sign and Submit" from the dashboard to send your application to SBA a. You application can only be submitted when all sections are complete, including additional contributor sections You will not be able to edit your application after submission unless SBA requests more information