



Certify Quick Start Guide for Firms

Getting Started

Task	Instructions
Before Starting your 8(a) Application	<ol style="list-style-type: none">1. Visit certify.SBA.gov to utilize the Am I Eligible tool to help determine potential 8(a) eligibility2. Download the application checklist from the prepare section of certify.SBA.gov to gather all required documents3. Save documents as PDF files with the naming convention: document title_year (ex. W2_2015) <p>NOTE: Only firm owners are permitted to create accounts on Certify</p>
Obtain a DUNS Number	<ol style="list-style-type: none">1. Visit DUNS Request Service to apply for your Data Universal Numbering System (DUNS) Number
Register in the System for Award Management (SAM)	<ol style="list-style-type: none">1. Visit SAM.gov and click “Create an Account” in the top right and proceed to create an Individual Account2. SAM.gov will request your DUNS number3. 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	<ol style="list-style-type: none">1. Visit certify.SBA.gov2. Click on the “Get Started” button to begin the registration process. Only firm owners are permitted to create accounts in Certify.3. You will need your DUNS number, TIN number, EIN or SSN, MPIN (from SAM.gov) and firm structure (e.g., corporation, LLC, sole proprietorship) to register and link your SAM.gov profile to Certify4. Create a passphrase. The passphrase requirement is complex to protect the personal information you will upload to Certify<ol style="list-style-type: none">a. 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 contactsb. The account creation email link expires after 24 hours

Accessing and Completing your Application

Task	Instructions
Fill out your Application	<ol style="list-style-type: none"> 1. Log into your Certify account 2. Select the 8(a) application 3. Begin filling out your Eligibility information 4. Upon finishing this section, you will be taken to your Application Overview 5. Review and complete the other sections 6. Each section has various questions/prompts to help complete your application and upload documents 7. It is recommended that you start by adding additional relevant contributors after completing Eligibility; see “Add Contributors” below for details 8. After, complete your Individual Contributors section by selecting “Add or Update your DVD Information.” 9. When finished, you will be returned to the Application Overview 10. Complete the remaining sections (Business Ownership, Character, Potential for Success, and Control) 11. As you complete each section, you must select "Save and Continue" to move to the next page
Add Contributors	<ol style="list-style-type: none"> 1. Open the Individual Contributors section to submit each individual contributors’ name and email address <ol style="list-style-type: none"> a. This will send an invitation to each individual to create an account to log into Certify and fill out their contributor questionnaire b. The firm owner can see the status of each individual’s questionnaire and is able to send reminders on the right side of the Application Overview page, if needed c. To protect personal information, contributors do not have access to the firm owner’s application information and contributors (where multiple) cannot see each other’s’ information in Certify d. Individuals include spouses, other disadvantaged individuals, and non-disadvantaged individuals who own more than 10% of the company
Make Edits to Application Sections	<ol style="list-style-type: none"> 1. Select the section title (ex. Individual Contributors) where you wish to make edits and necessary changes 2. The edit will not be saved unless you continue through the section and click

	"Save and Continue."
Upload and View Documents	<p>Upload:</p> <ol style="list-style-type: none"> 1. You will be prompted to upload documents while filling out your application in Certify <ol style="list-style-type: none"> a. Documents should be saved as PDF files with the naming convention: document title_year (ex. W2_2015) b. Files must be 25MB or less c. Do not password protect any files <p>View:</p> <ol style="list-style-type: none"> 1. To view all documents uploaded in Certify, regardless of program/application, click the white "Documents" link in the dark blue navigation bar at the top of the page 2. To view documents associated with your application, click on your application and then click the "Documents" tab within the application
Delete Documents	<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 <ol style="list-style-type: none"> a. You cannot delete documents that have been uploaded in Certify
Submit Your Completed Application	<ol style="list-style-type: none"> 1. Select "Sign and Submit" from the dashboard to send your application to SBA <ol style="list-style-type: none"> a. Application can only be submitted when all sections are complete, including additional contributor information b. You will not be able to edit your application after submission unless SBA requests more information

What to Expect After Applying

Task	Instructions
Check the Status of Your Application	<ol style="list-style-type: none"> 1. Log into your Certify account 2. View the “Status” column for your application on the dashboard
Correspond with SBA after Submission	<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 after your application has been assigned
Revise an Application Returned During Screening	<ol style="list-style-type: none"> 1. If your application is returned, you will receive an email notification 2. Log into Certify and access your application 3. 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 4. The entire application is now unlocked for editing. Review each questionnaire to address the issues mentioned and upload new documents, if necessary 5. You may send a message back to SBA for further clarification if needed <p>Notes:</p> <ol style="list-style-type: none"> 1. If your application needs minimal updates, it will be returned with a “15-day letter,” which outlines the changes to be submitted within 15 calendar days 2. If the application requires significant updates, the feedback will indicate the required changes, but the firm has no obligation to return the changes within any specified period of time
Revise an Application Returned During Processing	<ol style="list-style-type: none"> 1. 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 2. Firms will receive separate messages per section returned that clarify what information needs to be added <ol style="list-style-type: none"> a. 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
Respond to Your Determination Letter	<ol style="list-style-type: none"> 1. If you receive an approval letter, SBA will send an acceptance package for you to sign <ol style="list-style-type: none"> a. Once SBA receives the signed package, your 9 years in the 8(a) Business Development program begins

	<ol style="list-style-type: none"> 2. If you receive a decline letter, click on your 8(a) application to visit the Application Overview page <ol style="list-style-type: none"> a. This page shows you your options and provides a link to the decision letter that goes into more detail about why you were declined
Appeal	<ol style="list-style-type: none"> 1. There is no reconsideration process for applications that have been declined 2. If you have been declined, you may file an appeal with SBA's Office of Hearings and Appeals <ol style="list-style-type: none"> a. You may appeal a denial within 45 days after you receive the Agency decision
Reapply	<ol style="list-style-type: none"> 1. If you have been declined for 8(a) BD program participation, you may submit a new application for admission to the program at any time after 90 days from the date of the Agency's final decision to decline 2. If you have been declined three times within 18 months of the date of the first final Agency decision finding you ineligible, you cannot submit a new application for admission to the program until 12 months from the date of the third final Agency decision to decline