Certify Quick Start Guide for Firms

Task	Instructions
	Getting Started
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 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 DUNS Number	Visit **DUNS Request Service** to apply for your Data Universal Numbering System (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	Visit **certify.SBA.gov** and click on the "Get Started" 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 (e.g. corporation, LLC, sole proprietorship) to register. 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.

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	Accessing and Completing your Application
Fill out your Application	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. 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.
Add Contributors	Open the Individual Contributors section to submit each individual contributors' name and email address, which will send an invitation to each individual to create an account to login to Certify and fill out their contributor questionnaire. 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. To protect personal information, contributors do not have access to the firm owner's application information and contributor's (where multiple) cannot see each other's' information in Certify. Note: Individuals include spouses, other disadvantaged individuals, and non-disadvantaged individuals who own more than 10% of the company.

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Make Edits to Application Sections	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."
Upload and View Documents	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. View: 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 to your app
Delete Documents	Click the "Documents" link in the dark blue navigation bar at the top of the page and click the trash can icon to archive a document. Archived documents remain viewable by SBA but no longer appear in the documents list for the application. Note: You cannot delete documents that have been uploaded in Certify.
Submit Your Completed Application	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.
	What to Expect After Applying
Check the Status of Your Application	Log into your Certify account and view the "Status" column for your application on the dashboard.
Correspond with SBA after Submission	Click the "Messages" tab found in the application menu on your application overview screen. You will be able to correspond with an SBA analyst after your application has been assigned.

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Revise an Application Returned During Screening	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. 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. Or, 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	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.
Respond to Your Determination Letter	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. 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.
Reconsideration (coming soon)	*SBA will work with firms to work through reconsideration until this feature is available in the Certify.*

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