SBA 8(a) Business Development MIS: User Guide for Initial 8(a) Program Applicants and Firms Returning for 8(a) Annual Review

User Guide 1.0
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1. 8a Program Overview

The 8(a) SBA Business Development MIS (Management Information System) Application was developed for the U.S. Small Business Administration, the Office of Government Contracting and Business Development, and the Office of Business Development (SBA, GC & BD, BD).

The SBA’s mission is to maintain and strengthen the Nation’s economy by aiding, counseling, assisting, and protecting the interests of small businesses and by helping businesses and families recover from disasters. The BD (Business Development) assists firms owned and controlled by economically and socially disadvantaged individuals enter the economic mainstream.

Assistance is rendered to eligible firms in a structured developmental process over a nine-year program participation term. Services include provision of: developmental analysis, counseling, and progress monitoring; management and technical assistance authorized under section 7(j) of the Small Business Act; and access to business development opportunities under section 8(a) of the Act. Firm-specific analysis, counseling, and monitoring services are provided to eligible firms by staff located in SBA's district offices. Management training and professional consulting is provided by contractors and grant recipients. Developmental opportunities, in the form of sole-source and limited competition Federal contracts, are provided by acquisition agencies.

Firms are certified for participation in the 8(a) BD Program by staff of the Office of Certification and Eligibility (OCE) located at Central Office Duty Stations (CODS) in San Francisco and Philadelphia. In addition to determining initial eligibility for the 8(a) BD Program, the OCE certifies firms as SDB's under Economy Act Agreements with Federal agencies.

This system is a web-based system for submission and processing of applications for certification under the 8(a) BD Program. The system also provides for the processing of Annual reviews submitted by 8(a) firms. Annual reviews are process by District Offices.

Applicants submit applications for 8(a) certification electronically via the Internet. Agency staff and managers use the system’s decision support analytical tools to quickly and accurately evaluate applications, and render correct eligibility decisions. Once certified, a given firm returns to the system on an annual basis over the duration of their term in the program to update their data and complete the required Annual Review forms. District Office staff are responsible for reviewing this information and conferring continued eligibility status on the firms.

By developing and deploying this system, the Agency has significantly streamlined both the 8a certification and annual review procedures, reducing processing time and improving the quality and consistency of eligibility and annual review determinations. The overall benefit is enhanced program integrity.
2. Purpose of This Guide

This manual is intended for use by a firm either a) seeking initial certification in the 8(a) Business Development Program or b) returning to the system to enter data and complete the required forms for their 8(a) Annual Review. It provides a step-by-step guide to enable the firm to apply for 8(a) status by completing the following processes:

- Obtain a userid and password for access to the SBA General Login System (GLS). This provides secure access to the electronic 8(a) certification system.
- Enter data to complete all the forms required for 8(a) certification and/or their 8(a) Program Annual Review.
- Collect all required supporting documentation for 8(a) certification and/or their 8(a) Program Annual Review.
- Submit required data electronically to the SBA.
- Print and sign all completed forms required for 8(a) certification and/or their 8(a) Program Annual Review.
- Mail the entire package to the SBA for processing.

3. 8(a) Certification Process Overview

I. To do business with the Federal government and to be certified under the 8(a) Program, you must register in the Central Contractor Registration (CCR) (http://www.ccr.gov/) database, and complete the Small Business Supplemental Page within CCR. Note - If you are a new registrant to CCR and/or updating your profile in CCR, you may experience a 24 to 72 hour waiting period before you are given access to the 8(a) Business Development Program electronic certification system, as the databases in the two systems synchronize. We apologize for any inconvenience this may cause.

II. You must also register for an account in the SBA's General Log-in System (GLS) (https://eweb.sba.gov/gls/dsp_addcustomer.cfm). GLS provides a single log-in point for all services of the SBA. This streamlines and simplifies service delivery to our clients. (https://eweb.sba.gov/gls/dsp_addcustomer.cfm).

III. Log-in (https://eweb.sba.gov/gls) to the 8(a) Business Development Program electronic certification system via SBA General Log-in System (GLS).

IV. Complete and submit the electronic application, following the step-by-step directions provided by the system. Also, you must mail in signed hard-copy versions of all required forms, as well as all required supporting documentation outlined in the 'Checklist' provided.

V. The application is then reviewed by the SBA. The length of time for the review of an application depends on the complexity of the application. Regulations stipulate a maximum time-frame of ninety days to process an application from the time it is deemed complete by the SBA. So it is in your best interest to ensure that the package you mail in to the SBA contains all the required information and documentation. Otherwise processing delays could result. We will, of course, do our best to process your application and render a decision as quickly as possible.
VI. Certified 8(a) firms, will also use this system to complete annual review materials at the appropriate annual review dates.
3.1. **Access/Preparation**

I. Prior to applying for the 8(a) Program, each firm is urged to take an on-line training and self-evaluation course, which is accessible via the following link: 8(a) Business Development Suitability Tool - [http://training.sba.gov:8000/assessment](http://training.sba.gov:8000/assessment).

II. **Paper-Based Applications**: While requiring considerably more time to process, paper application for 8(a) Program certification may be obtained by written request to: Associate Administrator for Business Development, 409 Third Street, S.W. 8th Floor, Washington, DC 20416
I. The first section of the on-line course explains the 8(a) Program in detail and culminates in an eligibility self-assessment test. The test consists of a series of simple yes/no questions that evaluate the degree to which a firm meets the basic qualifications for the 8(a) Program. If the basic eligibility criteria are met, the user is granted full access to the online application for the 8(a) Program. If key eligibility criteria are not met, the user is directed to the SBA resource most qualified to provide the assistance needed to overcome the deficiency identified by the assessment test.

II. Responses are entered by marking “yes” or “no” for each question.

III. After all questions have been answered, select the “submit” button (not pictured below).

IV. To clear answers and to start over, select the “reset” button (not pictured below).
I. After a Suitability Test is submitted, the system will present a Client Assessment and suggested next steps.

II. If a sufficient number of questions in the assessment are answered in the affirmative, the subsequent Client Assessment will include a link to the 'Applicant Guide' of the BDMIS (see next page).

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III. Note: The average processing time for an electronic application is ninety days.
3.2. Applicant Guide

I. Users who ‘pass’ the 8(a) self-assessment test will be directed to the web-page shown below.

II. Returning users can navigate to this page directly by going to this link: https://sba8a.symplicity.com/applicants/guide.

III. This web-page provides an overview to the entire electronic application process.

IV. ‘Quick Links’ in the upper right-hand corner provide rapid access to the various steps required to gain access to the BDMIS. These steps are explained in detail below.
3.3. **Obtain a GLS Userid and Password**

I. Click on the following link to access the GLS Log-In screen: https://eweb.sba.gov/gls/dsp_login.cfm

II. Click on ‘Request SBA User ID’ from the links in the left hand blue navigation bar.

III. Please complete the ‘Profile’ form that appears.
I. The image below shows the bottom of the profile form. Care should be taken to ensure that the email address for the user is current and correct, as the user’s new GLS userid and password will be sent to that address.

II. When the profile is completed, click ‘Submit’, at the bottom of the page.

III. Once submitted, a new userid and temporary password is emailed to the email address entered in the profile. Follow the logon instructions contained in the email (sample email shown).
I. Log into GLS (link: https://eweb.sba.gov/gls/dsp_login.cfm), using the new userid and temporary password. Enter User ID and Password and click “Login”.

II. New Accounts should change their password as directed and then log in again with the new password.
I. Click ‘OK’ on the ‘Welcome’ screen that appears.

II. Change 'Password'

ERROR. First Time Login. Please change your password before continuing.

New Password:
Retype New Password:

Change Password
3.4. Update Profile with EIN / DUNS

I. Once a new password has been established, the account profile has to be updated to include the firm’s EIN and DUNS. Access to the full 8(a) electronic application depends on the successful completion of this step.

II. On the screen that appears, click on ‘Update Profile’
I. When it appears, scroll to the bottom of your profile (second screen below). Click on the 'yes' button for 'Add New Business'. This will cause two new fields to appear: EIN and DUNS.
1. Enter your firm’s EIN and DUNS in the appropriate fields. These entries must match the corresponding entries in your firm’s CCR/DSBS Profile. GLS must find matching entries in CCR/DSBS, or a firm will not be given access to the BDMIS. If the entries in GLS do not match the corresponding ones in CCR/DSBS, you will receive an error message and will be blocked from further progress in the BDMIS. If this occurs, re-check your entries in GLS. If the error message persists, the problem may stem from incorrect CCR profile entries. Please check your firm’s EIN and DUNS in CCR and make any corrections that are warranted. Then re-try the above step.

2. After the correct EIN and DUNS are entered, click on the ‘Submit’ button at the bottom of the page.
I. If GLS finds the matching entries in CCR, the Message “your profile information has been successfully updated” appears on the next screen.
3.5. **Request 8aSDB Application Access**

I. Click on the blue button marked “Access” at the top of the screen to request access to the 8(a) certification application. You will be presented with a list of file folder icons that reflect the systems available to you.

II. Click on the first icon in the list, entitled ‘8aSDB Application’.

III. A ‘check box’ appears entitled ‘8A SDB Applicant’. Check the box.
I. Next, a field with a drop-down menu will appear. Highlight in blue the line item that shows your EIN and DUNS numbers.

II. Scroll to the bottom of the page and click on ‘Submit’ (not pictured).
I. The next screen should include a message indicating that an update was successful.

II. The screen should also now show an active ‘hot-link’ entitled, ‘8aSBD Application’. Click on it to proceed to the application.

III. If the ‘8aSDB Application’ hot link does not appear, click on “Choose Function” at the top of the screen.

IV. The following screen should appear. Now, click on the hot link entitled ‘8aSDB Application.’
I. The next screen shows the overview page of the BDMIS.

II. This means a user has full access to the system. This means an applicant can complete the on-line forms for 8a Certification or Annual Review.

III. The screen below shows the forms and instructions that pertain to first-time certification in the 8(a) Program. The Annual Review interface is shown in the subsequent screen.
3.6. **Application Information Privacy**

I. The information submitted as part of an electronic application is protected by a username/password based authentication system for all system interactions that require authorization.

II. All authentication related system interaction will be protected using secure, encrypted communications (SSLv3 with 128-bit encryption) to ensure that system passwords cannot be detected by network intruders. SSL is the industry standard for secure network communications.

III. For further information regarding SBA’s Internet Privacy Policy please contact BDMIS@sba.gov.

3.7. **False Statements**

I. Submitted materials should be truthful and accurate, and submitted by the applicant, as there are serious legal consequences for falsifying information in an 8(a) Program application. These may include fines, imprisonment or both.

3.8. **Help**

I. To get further assistance with the 8(a) application/certification, email questions or concerns to BDMIS@sba.gov
3.9. Submit an 8(a) Application

3.9.1. Navigate to the 8(a) Application

I. Click the “8aSDB Application” link to navigate to the online application.
3.9.2. Steps of the Online 8(a) Application

After successfully logging-in, the user is first presented with an overview page of the 6 step application process. The first steps are ‘active’ and are shaded in green and yellow. Subsequent (i.e., not yet applicable) steps are shown with a gray ‘inactive’ background. As an applicant progresses through the process, the subsequent steps become ‘active’ and the colors change from grey to green and yellow.

**Step 1: Submit Notarized Authorization Form**
- Applicants are required to submit a notarized authorization form. Click the “Download and Print Authorization Form” to print a copy of the form.

**Step 2: Complete Required Application Forms.**
- Applicants will complete web based forms to enter their application materials.
- Applicants can preview their application, as a single PDF document, by using the “Preview application Forms (PDF File).”

**Step 3: Assemble Supporting Documentation**
- A checklist is provided to help applicants organize this material. View and print out the checklist by clicking on the “Download and Print Supporting Document Checklist” button (shown in step 5). Once these documents have been collected, sign the checklist and include it with submitted application in step 6. Applicants will complete web based forms to enter their application materials.

**Step 4: Submit On-Line Input**
- Complete the online application forms.
  - The status of each form is shown.
  - Only complete forms should/can be submitted as part of an application.

**Step 5: Download, Print and Sign Completed Application**
- Use the “Download and Print Supporting Document checklist” to print out a completed application.

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Step 6: Mail Application, Supporting Documentation & Checklist to the SBA

3.9.3. Step 1) Submit Notarized Authorization Form

I. Applicants are required to submit a notarized authorization form. Click the “Download and Print Authorization Form” on the overview page to print a copy of the form.

II. Submit this form with submitted materials.
3.9.4. Step 2) Enter Forms / Edit Data

I. Step two is where forms are completed in the system.

II. Click the link “detailed status of each form” to navigate to the forms that need to be completed.

III. Doing so takes you to the bottom of the page. Here you will see a listing of each form under the heading “Individual Form Status”.

IV. Forms are highlighted in yellow designated with a red x if they are not complete.

V. When forms have been completed, they will be marked with a green “checkmark”.

VI. Click “Complete/Update Form” to open the form for edits.

VII. When the application is started, the following forms will be listed for the applicant:

   a. Form 1010, Business Information
   b. Form 1010, Personal Information
   c. Form 1623
   d. Form 1790
I. When a form is open for edits, a red asterisk indicates that the field is a required field. You will not be able to complete the form until all required fields have been entered.

II. Use the "Save Changes" button to save data in the online form. After use, remain on the form for further edits.

III. Use the "Save & Return to Overview" button to save the data to the form, and to return to the application overview page.

IV. Use the "Verify Completeness" button to ensure all required fields have been answered.

V. Use the "Clear Changes" to revert the form to the last version that was saved.

VI. Use the "Return to Overview" button to return to the overview without saving.
I. When the ‘Verify Completeness’ button is clicked, any missing data is highlighted at the top of the page in an “errors detected” box outlined in red. The form shows a red ‘X’ at this point, which indicates the form is still incomplete. To complete a form successfully, the user must resolve all errors in the form. Only then will a green ‘checkmark’ replace the red ‘X’ for this form.

II. Go through each form, and complete the required elements. Use the ‘Verify Completeness’ function on each form to ensure it is ready for submission. A form is ready for submission when it shows a green ‘checkmark’ on the Overview page, or the ‘My SBA Forms’ section on any page (example at right).
I. As the applicant enters data into the online forms, especially the ‘Form 1010, Business Information,’ the system creates additional forms as warranted by the existing regulations.

II. For example, any owner claiming social disadvantage in the Form 1010 or showing 10% or more ownership of the firm triggers the creation of Forms 413 and 912 for these individuals.

III. Image of Required forms that result if in the Form 1010 Business Information Form 1010 only William Smith is listed as having greater than 10% ownership and claiming social disadvantage.

IV. Image of Required forms that result if in the Form 1010 Business Information Form 1010 has both Francine P. Butler and William Smith with greater than 10% ownership and claiming social disadvantage.
I. Applicants can make edits to forms until the application is submitted. If changes are made in any form, be sure to validate them with the ‘Verify Completeness’ function.

II. After all forms have verified complete as described above, Step 2 on the Overview displays the notation ‘You have completed 7 of 7 forms’ as well as two active buttons, ‘Preview Application (PDF File)’ and ‘I Have Completed This Step’. Click on both buttons to confirm completion of this step.

III. If you click the “view draft” link, the forms will open in printable format (with DRAFT designation).
VIII. After all forms have been completed, each form will have a green checkmark.

Individual Form Status

You will find detailed status of each form within your application below. You may review an individual form’s completeness, edit the form, and view a draft copy of the filled-in PDF that will included in your full application packet.

<table>
<thead>
<tr>
<th>Form 1010, Business Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Application for 8(a) Business Development (8(a) BD) Certification</td>
</tr>
<tr>
<td>✓ Verified Complete ✓ View Draft ✓ Complete/Update Form</td>
</tr>
</tbody>
</table>

| Form 1623 |
| Certification Regarding Debarment, Suspension, and Other Responsibility Matters Primary Covered Transactions |
| ✓ Verified Complete ✓ View Draft ✓ Complete/Update Form |

| Form 1790 |
| Representatives Used and Compensation Paid for Services in Connection with Obtaining Federal Contracts |
| ✓ Verified Complete ✓ View Draft ✓ Complete/Update Form |

<table>
<thead>
<tr>
<th>Form 912, Statement of Personal History</th>
</tr>
</thead>
<tbody>
<tr>
<td>✓ Form 912: William H. Smith ✓ Form 912: Francine P. Butler</td>
</tr>
<tr>
<td>✓ Verified Complete ✓</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Form 413, Personal Financial Statement</th>
</tr>
</thead>
<tbody>
<tr>
<td>✓ Form 413: William H. Smith ✓ Form 413: Francine P. Butler</td>
</tr>
<tr>
<td>✓ Verified Complete ✓</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Form 4506-T, Request for Transcript of Tax Return</th>
</tr>
</thead>
<tbody>
<tr>
<td>✓ Form 4506-T: Advanced Technologies Consultants ✓ Form 4506-T: William H. Smith ✓ Form 4506-T: Francine P. Butler</td>
</tr>
<tr>
<td>✓ Verified Complete ✓</td>
</tr>
</tbody>
</table>
IV. Applicants can make edits to forms until the application is submitted. If changes are made in any form, be sure to validate them with the ‘Verify Completeness’ function.

V. After all forms have verified complete as described above, Step 2 on the Overview displays the notation ‘You have completed 7 of 7 forms’ as well as two active buttons, ‘Preview Application (PDF File)’ and ‘I Have Completed This Step’. Click on both buttons to confirm completion of this step.

2 Complete Required Application Forms
Please complete each form by answering the questions that appear when you click on ‘edit’ for each form below.
You have completed 7 of 7 required forms. See below for detailed status of each form.

- Preview Application Forms (PDF File)
- I Have Completed This Step
3.9.5. Step 2) Alternative Approach - My SBA Forms

I. On the right side of the application overview page, the applicant will also see the “My SBA Forms” list. This list is an alternative means of managing the forms of your application.

II. The list will present a “red x” next to the form names if they are not complete.

IX. After a form has been completed, the form will present a “green checkmark” indicating it has been completed and verified.
VII. When the application is started, the following forms will be listed for the applicant:
- Form 1010, Business Information
- Form 1010, Personal Information
- Form 1623
- Form 1790

VIII. From the “My SBA Forms” navigation, click on the form link to begin entering data into the online form.

IX. When a form is open for edits, a red asterisk indicates that the field is a required field. You will not be able to complete the form until all required fields have been entered.

X. Use the “Save Changes” button to save data in the online form. After use, remain on the form for further edits.

XI. Use the “Save & Return to Overview” button to save the data to the form, and to return to the application overview page.

XII. Use the “Verify Completeness” button to ensure all required fields have been answered.

XIII. Use the “Clear Changes” to revert the form to the last version that was saved.

XIV. Use the “Return to Overview” button to return to the overview without saving.
VI. As the applicant enters data into the online forms, especially the ‘Form 1010, Business Information,’ the system creates additional forms as warranted by the existing regulations. For example, any owner claiming social disadvantage in the Form 1010 or showing 10% or more ownership of the firm triggers the creation of Forms 413 and 912 for these individuals.

VII. Image of Required forms that result if in the Form 1010 Business Information Form 1010 only William Smith is listed as having greater than 10% ownership and claiming social disadvantage.

VIII. Image of Required forms that result if in the Form 1010 Business Information Form 1010 has both Francine P. Butler and William Smith with greater than 10% ownership and claiming social disadvantage.
I. When the ‘Verify Completeness’ button is clicked, any missing data is highlighted at the top of the page in an “errors detected” box outlined in red. The form shows a red ‘X’ at this point, which indicates the form is still incomplete. To complete a form successfully, the user must resolve all errors in the form. Only then will a green ‘checkmark’ replace the red ‘X’ for this form.

II. Go through each form, and complete the required elements. Use the ‘Verify Completeness’ function on each form to ensure it is ready for submission. A form is ready for submission when it shows a green ‘checkmark’ on the Overview page, or the ‘My SBA Forms’ section on any page (example at right).

III. Once all forms are “verified completed” and show the corresponding green checkmarks, the online application is ready to be submitted electronically to the SBA (example at right).

IV. Applicants can make edits to forms until the application is submitted. If changes are made in any form, be sure to validate them with the ‘Verify Completeness’ function.

V. After all forms have verified complete as described above, Step 2 on the Overview displays the notation ‘You have completed 7 of 7 forms’ as well as two active buttons, ‘Preview Application (PDF File)’ and ‘I Have Completed This Step’. Click on both buttons to confirm completion of this step.
3.9.6. Step 3) Assemble Supporting Documentation

I. Federal statutes and regulations require the applicant to include certain Supporting Documents with their application. A checklist is provided to help organize these materials. View and print out the checklist by clicking on the “Print Checklist” button.

II. Once the documents listed in the checklist have been collected, applicants should sign the checklist and put it aside for inclusion the package they mail-in to the SBA.

III. To Confirm completion of this step, click on the “Confirm” button.

3.9.7. Step 4) Submit On-Line Input

IV. After Step 3 is completed, Step 4 will become ‘active’. Now the user may click on the button marked ‘Submit On-line Input to SBA’ button to submit the data from the online application to the SBA.
3.9.8. Step 5) Download, Print and Sign Completed Application

I. In Step 5, the applicant should review the completed application and verify that all the information is correct.

II. The applicant should print out the application, sign and date all forms in the appropriate signature blocks, including the attachment pages. Application forms and other supporting materials (and corresponding signed checklist) should be included in the packet for mailing to the SBA.

III. When finished, click the “I have signed and Dated All Documents Where Appropriate” button to confirm this step is complete.
3.9.9. Step 6) Mail Materials to the SBA

I. Once Step 5 is completed, Step 6 will become ‘active’ and show the address to which the applicant should mail the completed full Application, Checklist, and Supporting Documents.

II. Click on the “I have Mailed the Completed Packet to the SBA” button to confirm this step is complete.

III. After completion of Step 6, the applicant will see a confirmation message that their materials have been submitted. All steps will be shaded in green when completed.

IV. Once the SBA receives the application packet, the applicant will receive a confirmation that the application is being processed. Subsequent communications about approval, denials, or other requests from the SBA will be forthcoming as warranted.
3.10. Submit for Reconsideration of Denied Application

I. If the application for certification for a given firm is declined, the applicant has forty-five days to submit the application for reconsideration by clicking on Step 7 ’Request Reconsideration by the SBA’

<table>
<thead>
<tr>
<th>7</th>
<th>Request Reconsideration by SBA</th>
</tr>
</thead>
<tbody>
<tr>
<td>You may request a reconsideration by SBA within 45 days of the denial decision. You have until Oct 09, 2008 to request reconsideration.</td>
<td></td>
</tr>
</tbody>
</table>

Individual Form Status

You will find detailed status of each form within your application below. You may review an individual form status and take the appropriate time to complete or correct the form.
4. 8(a) Program Annual Review

4.1. Returning Users - Logon

One year after an approval has been granted, firms are prompted to complete the steps required to complete their 8(a) Program Annual Review. A firm is required to undergo this review on an annual basis to maintain eligibility for the program. The maximum program tenure for any firm is nine years. When completing and submitting forms for the Annual Review, a returning firm is presented with the same interface they used when applying for 8(a) program certification. The firm also uses the same GLS userid and password they used when applying for 8(a) certification.

I. Point your browser to https://eweb.sba.gov/gls/dsp_login.cfm
II. The main navigation options for this page run along the left side of the page.
III. In the center of the page, you can enter your user id and password for your SBA Account.
IV. Select “login” button to logon to the online system.
V. If you do not have a user name and password, use the left navigation bar option “request SBA User ID, and follow the directions on pp. 12 – 25. Then return to this section for further instructions.
VI. There is also a “forgot password” option that can be used to assist users needing password assistance.
I. Once a user has logged onto the system, a ‘Terms of Use’ screen is presented.
II. To accept the terms of use, click the ‘OK’ button.
III. If you do not agree to the terms of use, click the ‘Log Off’ button.
The user is now presented with the ‘Overview’ page. This page contains all the instructions, steps and forms for completing the Annual Review. Note that it closely resembles the interface used by the firm for their original 8(a) certification. By thus ensuring that the firm returns to a familiar user environment for the Annual Review, we hope to boost user productivity and satisfaction.

I. The ‘Overview’ also indicates the date the Annual Review submission is due from the firm. This date is the current 8(a) program year anniversary date plus thirty days.
4.1.1. **Step 1) Complete Required Annual Review Forms**

I. The required Annual Review forms are shown in the center section of the Overview page, below the explanation of the various Steps in the process. The user should complete or update each form by answering the questions that appear when they click on 'Complete/Update Form' for each form.

II. Forms that are not completed, will display with a "red X".

III. Completed forms will appear with a "green checkmark".

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**Individual Form Status**

You will find detailed status of each form within your application below. You may review an individual form's completeness, edit the form, and view a draft copy of the filled-in PDF that will included in your full application packet.

- **Form 1450, 8(a) Annual Update**
  - 8(a) Annual Update
  - **Not Complete**
  - [View Draft] [Complete/Update Form]

- **Form 1010, Business Information**
  - Application for 8(a) Business Development (8(a) BD) and Small Disadvantaged Business (SDB) Certification
  - **Verified Complete**
  - [View Draft] [Complete/Update Form]
4.1.2. Step 2) Assemble Supporting Documentation

I. As was the case with the original application, applicants must include certain Supporting Documents to accompany their Annual Review forms. A Checklist is provided to help organize this material. The Checklist also indicates which required forms should be printed, signed and included in the packet the applicant mails to the SBA.

II. View and print out the Checklist by clicking on the “Print Checklist” button.

III. Once all materials have been collected, applicants sign the checklist and include it with their submitted materials.

IV. Confirm this step by clicking on the “Confirm” appropriate button.
4.1.3. **Step 3) Submit On-Line Input**

I. Submit the annual review on-line application by click the Submit On-Line Input to SBA.

II. Once an applicant has submitted the required on-line data, Step 3 will present a confirmation message.

4.1.4. **Step 4) Download, Print and Sign Completed Application**

III. Applicants should print, verify, sign and date all forms in the appropriate signature blocks, including the attachment pages.

IV. Applicants should include in the packet they mail to the SBA all materials delineated in the checklist, including specific signed and dated Annual Review forms and Supporting Documentation.

V. Once Steps 1 through 3 are completed, the applicant should click the ‘I have Signed and Dated All Documents Where Appropriate’ button in Step 4.
4.1.5. Step 5) Mail Annual Review Materials to the SBA

I. Mail the completed Annual Review to the SBA at the address shown in Step 5.
II. Select the “I have Mailed the Completed Packet to the SBA” button to confirm this step is complete.

<table>
<thead>
<tr>
<th>Mail Annual Review Forms, Supporting Documentation &amp; Checklist to the SBA</th>
</tr>
</thead>
<tbody>
<tr>
<td>2 Gateway Center</td>
</tr>
<tr>
<td>15th Floor</td>
</tr>
<tr>
<td>Newark, New Jersey 07102</td>
</tr>
<tr>
<td>Finally, submit your electronic application.</td>
</tr>
<tr>
<td><strong>I Have Mailed The Completed Packet To The SBA:</strong></td>
</tr>
</tbody>
</table>

III. After the step 5 button has been clicked, applicants will see a confirmation message that their materials have been submitted.

IV. Once the SBA receives an application packet, applicants will receive a confirmation that the annual review packet has been received and that it is being processed.
V. Subsequent communications about approval, denials, or other requests from the SBA will be forthcoming as warranted.