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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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Table of Contents

1.	8a Program Overview	3
2.	Purpose of This Guide	4
3.	8(a) Certification Process Overview	4
3.1.	Access/Preparation	5
3.2.	Applicant Guide.....	9
3.3.	Obtain a GLS Userid and Password	10
3.4.	Update Profile with EIN / DUNS.....	14
3.5.	Request 8aSDB Application Access.....	18
3.6.	Application Information Privacy.....	22
3.7.	False Statements	22
3.8.	Help.....	22
3.9.	Submit an 8(a) Application	22
3.9.1.	Navigate to the 8(a) Application	22
3.9.2.	Steps of the Online 8(a) Application	23
3.9.3.	Step 1) Submit Notarized Authorization Form	24
3.9.4.	Step 2) Enter Forms / Edit Data	25
3.9.5.	Step 2) Alternative Approach - My SBA Forms	31
3.9.6.	Step 3) Assemble Supporting Documentation	35
3.9.7.	Step 4) Submit On-Line Input	35
3.9.8.	Step 5) Download, Print and Sign Completed Application	36
3.9.9.	Step 6) Mail Materials to the SBA	37
3.10.	Submit for Reconsideration of Denied Application	38
4.	8(a) Program Annual Review.....	39
4.1.	Returning Users - Logon.....	39
4.1.1.	Step 1) Complete Required Annual Review Forms	42
4.1.2.	Step 2) Assemble Supporting Documentation	43
4.1.3.	Step 3) Submit On-Line Input	44
4.1.4.	Step 4) Download, Print and Sign Completed Application	44
4.1.5.	Step 5) Mail Annual Review Materials to the SBA	45

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1. 8a Program Overview

The 8(a) SBA 8(a) 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 processed 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.

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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.

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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>.
- 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

U.S. Small Business Administration
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Home > About SBA > SBA Programs > 8(a) Business Development Program > 8(a) Application

8(a) Application SBA Program Office SBA Programs

The 8(a) Business Development Program

We are pleased to provide you with information on the application process for certification in the 8(a) Business Development Program. The program provides eligible firms with greater access to the resources they need to grow and develop their businesses. This, in turn, improves their ability to compete on an equal footing with other firms in the mainstream American economy.

Applying On-Line for 8(a) BD Program Certification:

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 [8\(a\) Business Development Suitability Tool](http://training.sba.gov:8000/assessment). The completion of the on-line course explains the 8(a) Program in detail. It culminates in an eligibility self-assessment test. The test consists of a series of simple yes/no questions that evaluate the degree to which your firm meets the basic qualifications for the 8(a) Program. If you meet the basic eligibility criteria, you will be allowed to apply immediately for the 8(a) Program via the electronic on-line system. If key eligibility criteria are not met, you will be directed to the SBA resource deemed most appropriate to help you at this time. If you would still prefer at this time to apply using the electronic system, please send an e-mail to BDMIS@sba.gov for further guidance and assistance. The average processing time for an electronic application is ninety days.

Paper-Based Applications

While requiring considerably more time to process, you may also submit a paper application for 8(a) Program certification. A **paper application** may be obtained by means of a written request to:

Associate Administrator for Business Development

- > Home
- > About Us
- > Leadership
- > What's New
- > FAQs
- > Reports
- > Programs
- > Mentor-Protégé Program
- > Grant Information
- > Resources/ Opportunities
- > Contacts/ Representatives
- > **8(a) Application**
- > Forms
- > Glossary of Terms
- > Comments
- > GGBD Home Page

- 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).

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 Home

8(a) Business Development Program
 Suitability Assessment Tool

Is the 8(a) program for you? This assessment tool is designed to help you determine if the 8(a) program is a good fit for your business. It will prompt you with questions and assist you in evaluating your suitability for the program.

Your responses will be scored automatically and an assessment profile provided, when you click the submit button. You will also receive, based on your score, a statement of **Suggested Next Steps**, directing you to the most appropriate SBA resources and actions.

Every question in the assessment has a purpose. If you would like to know why a particular question is being asked, click on the (?) following each question.

Basic Requirements		YES	NO
1. Are you currently in business?	(?)	<input type="radio"/>	<input type="radio"/>
General Questions		YES	NO
2. Has your current business been operating for greater than two years?	(?)	<input type="radio"/>	<input type="radio"/>
3. Does your business have a current business plan?	(?)	<input type="radio"/>	<input type="radio"/>
4. Is your business represented in one or more of the following industry categories? (Construction, Information Technology, Manufacturing, Landscaping, Security Services and/or Office Support Services)	(?)	<input type="radio"/>	<input type="radio"/>
5. During this last year, were your gross sales greater than \$250,000?	(?)	<input type="radio"/>	<input type="radio"/>
6. Did you prepare or have prepared financial statements for your business this year?	(?)	<input type="radio"/>	<input type="radio"/>

> FirstGov > E-Gov > Regulations.gov > White House
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Done

MOST REQUESTED ITEMS
 BUDGET / PLANS REPORTS

the SBA resource deemed most appropriate to help you at this time. If you would still prefer at this time to apply using the electronic system, please send an e-mail to BDMIS@sba.gov for further guidance and assistance. The average processing time for an electronic application is ninety days.

>Comments
 >GCBD Home Page

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- I. After a Suitability Test is submitted, the system displays a Client Assessment with suggested next steps.

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 Home

Thank you for taking the time to respond to the 8(a) Business Development Suitability Assessment Tool. Your responses indicate that your business, currently or in the near future, may be a suitable candidate for the 8(a) program. Our goal at the SBA is to ensure that firms applying to the 8(a) program are eligible, suitable and ready. We also want to be reasonably sure that the business expectations of applicants are aligned with the objectives of the 8(a) program. This program is not intended for everyone. To this end, your assessment responses demonstrate that additional training and guidance could benefit your potential success in the 8(a) program. Use the following suggestions to guide your

Suggested Next Steps	
Step 1.	Review the free online seminar, INSIGHT: Guide to the 8(a) Business Development Program. <p style="text-align: center;">Review the Online Seminar</p> <p style="text-align: center;">(Click Here)</p>
Step 2.	Discuss specific 8(a) program objectives as well as the goals of your firm with an SBA representative.
Step 3.	Sharpen your business planning skills. Review, understand and apply the elements of business planning. Take the free online course, The Beginning: Developing a Successful Business Plan and prepare a current plan for your business. <p style="text-align: center;">Register for the Online Course</p> <p style="text-align: center;">Click Here</p>
Step 4.	Visit with a business mentor, coach or counselor to discuss the growth of your business venture, specific to government contracting.
Step 5.	Expand your business skills. Review the menu of online courses available through SBA's virtual campus: (http://www.sba.gov/training)
Step 6.	Follow-up with an SBA representative to discuss applying to the 8(a) program. After completing Steps 1 - 5, if you still feel you are ready to apply to the 8(a) program, proceed to the application. Apply Online (Click Here)

- 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).
- III. If not, the firm will be directed to the resource deemed most appropriate by the SBA to address the deficiencies highlighted by the assessment (see next page).

Client Assessment

Thank you for taking the time to respond to the 8(a) Business Development Suitability Assessment Tool. Based on your responses, it appears that you and your firm possess many of the characteristics that would make you a suitable candidate for applying to the 8(a) program. However, this tool provides only a preliminary indication of your suitability. You are encouraged to meet with an SBA representative to discuss your interest in the 8(a) program.

Suggested Next Steps

Step 1.	Discuss specific 8(a) program objectives as well as the goals of your firm with an SBA representative. Learn about the 8(a) program. Review the free online seminar, INSIGHT: Guide to the 8(a) Business Development Program.
Step 2.	Review the Online Seminar (Click Here)
Step 3.	Apply to the 8(a) program. Apply Online (Click Here)

Key Training and Counseling Resources

Free Online Training	http://www.sba.gov/training
SCORE	http://www.score.org
Small Business Development Centers	http://www.sba.gov/sbdc/sbdcnear.html
Women's Business Centers	http://www.sba.gov/onlinewbc/wbc.pdf
SBA District Offices	http://www.sba.gov/localresources/index.html
Regulations & Compliance	http://www.business.gov
Business Forms	http://www.sba.gov/tools/Forms/smallbusinessforms/index.html

II. (Arrow pointing to 'Apply Online')

III. (Arrow pointing to 'Free Online Training')

IV. 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.simplicity.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.

8(a) Certification

Welcome to the new internet-based system designed to help you organize and complete the materials required to obtain certification in the 8(a) Business Development Program. Following the directions closely, you will provide the SBA with the information it needs to process your application in the least amount of time. It has been designed to guide your efforts in a straightforward manner. Moreover, if you don't use this system to complete and submit your application, you may experience long processing delays, as the SBA manually processes your application.

IV.

QUICK LINKS

- [Guide for Applicants](#)
- [CCR Registration](#)
- [GLS Registration](#)
- [Log-in via GLS](#)
- [Frequently Asked Questions](#)
- [Hotlines & Email Support](#)

The Electronic Application Process

This new web-based interface provides step-by-step instructions to enable you to organize, complete and submit your application for 8(a) Business Development Program certification to the SBA in the least amount of time. Please note that, while an electronic record of your input to this system is retained by the agency, you must still provide hard-copy proof for the SBA to verify your claims.

The steps of the process:

1. To do business with the Federal government and to be certified under the 8(a) Program, you *must* register in the [Central Contractor Registration \(CCR\)](#) database, and complete the Small Business Supplemental Page within CCR. As a government-wide single point of vendor registration, CCR is a key aspect of streamlining and integrating electronic commerce into the Federal procurement process. Effective October 1, 2003, Federal Acquisition Regulation require contractors to register in CCR prior to award of any contract, basic agreement, basic ordering agreement, or blanket purchase agreement. It's easy to register in CCR. Just go to www.ccr.gov and select the **Start a New Registration** button.

Please read before you proceed:

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.

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.

The image displays two screenshots of the SBA General Login System interface. The top screenshot shows the 'SBA Account Login' form with fields for 'User ID' and 'Password', and buttons for 'Login' and 'Clear'. A blue arrow labeled 'II.' points from the 'Request SBA User ID' link in the left navigation bar to the login form. The bottom screenshot shows the 'Profile' form with sections for 'Login Information', 'Identity Information', and 'Contact Information'. A blue arrow labeled 'III.' points from the 'Request SBA User ID' link in the left navigation bar to the profile form.

General Login System (October 28, 2008)

SBA Account Login

User ID:

Password:

Login Clear

III. [Text Only](#)

General Login System

GLS Login

User ID:

Login Information

Identity Information

Name: (First) (Middle) (Last) (Suffix - Jr, Sr, I, II, etc)

Date of Birth:

PIN: (Personal Identification Number, Last 4 Digits of SSN)

Contact Information

Country:

Zip+4 Code:

Street 1:

Street 2:

City Name: (State)

Phone Number: (Country) (Area Code) (Phone Number) (Extension)

Last modified: 09/09/2008 12:00:00 PM
 * Privacy & Security * Information Quality * FOIA * No Fear Act * ADA
 SBA Processing: 0.138 seconds

- 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).

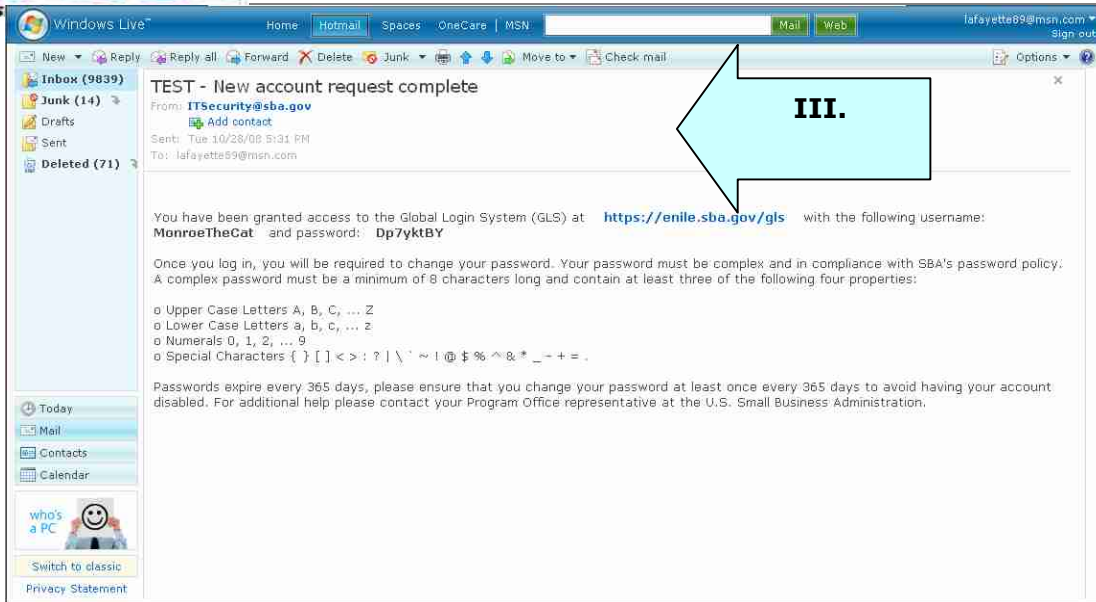
The screenshot shows the 'General Login System' interface. On the left is a blue sidebar with 'GLS Login' selected. The main form area is titled 'Contact Information' and contains the following fields:

- PIR:** [13344] (Personal Identification Number, Last 4 Digits of SSN)
- Country:** [UNITED STATES] (dropdown menu)
- Zip+4 Code:** [20878] [] [Lookup Zip]
- Street 1:** [1234 Jones Street]
- Street 2:** []
- City Name:** [GAITHERSBURG] [MD] (State)
- Phone Number:** (Country) [1] (Area Code) [301] (Phone Number) [333-6666] (Extension) []
- E-Mail Address:** [lafayette89@msn.com]
- Re-enter E-Mail:** [lafayette89@msn.com]

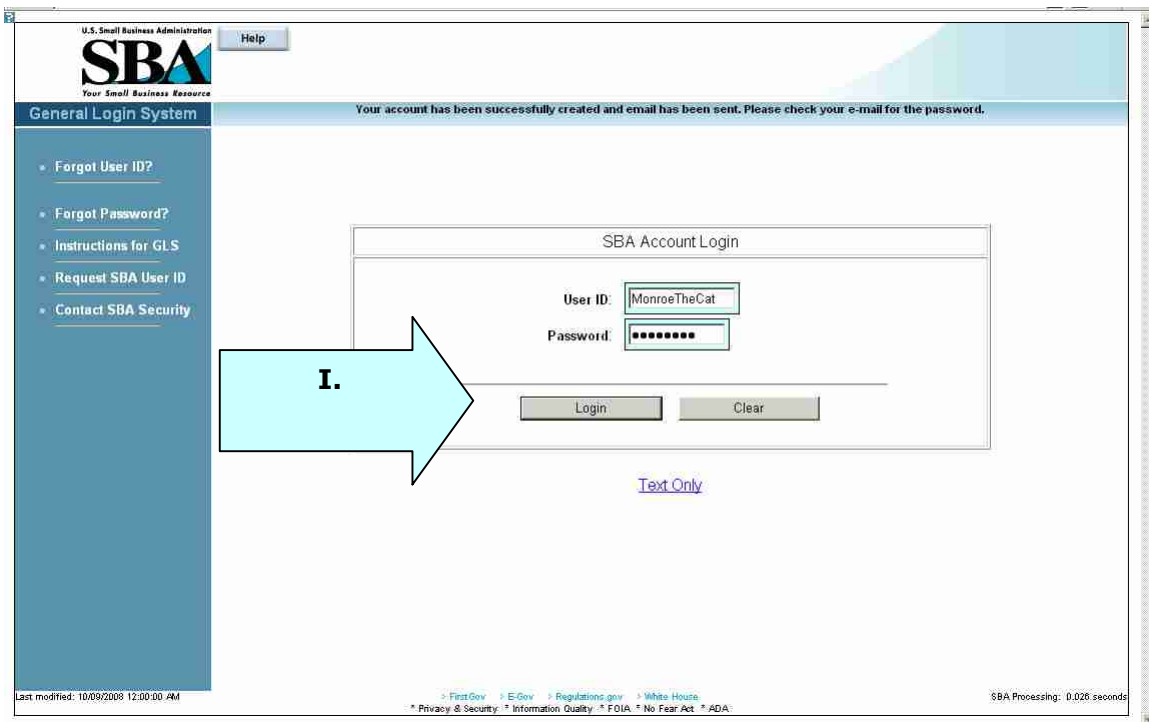
At the bottom of the form are buttons for 'Reset', 'Clear', and 'Submit'. A large cyan arrow labeled 'I.' points to the 'GLS Login' sidebar. Another large cyan arrow labeled 'II.' points to the 'Submit' button.

Footer text includes: 'Last modified: 09/09/2008 12:00:00 AM', 'FirstGov | E-Gov | Regulations.gov | White House', '* Privacy & Security * Information Quality * FOIA * No Fear Act * ADA', and 'SBA Processing: 0.138 seconds'.

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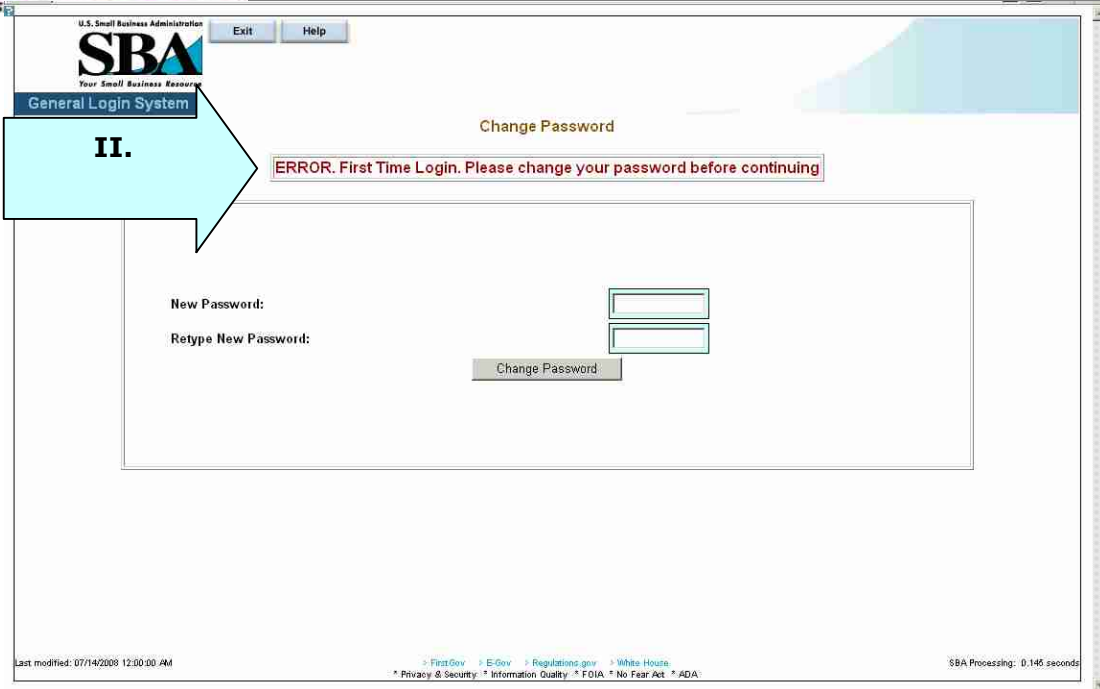


- I. Log into GLS (link: https://eweb.sba.gov/gls/dsp_login.cfm), using the new userid and temporary password. Enter User ID and Password and click "Login".

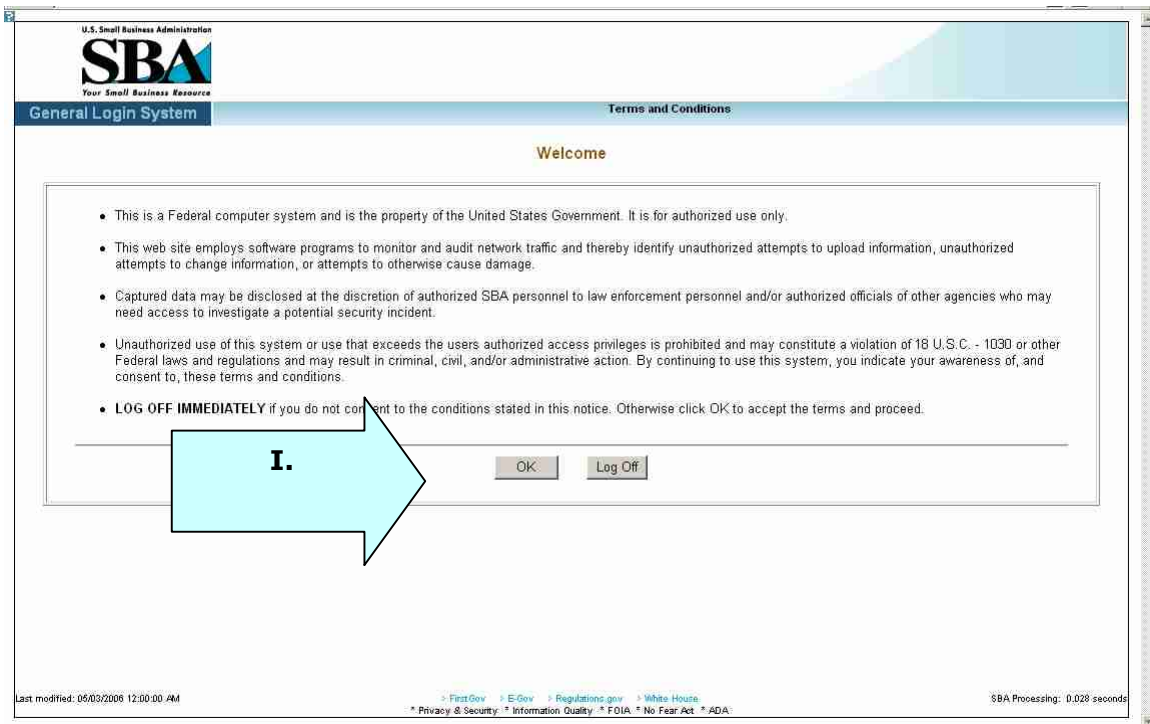


- II. New Accounts should change their password as directed and then log in again with the new password.

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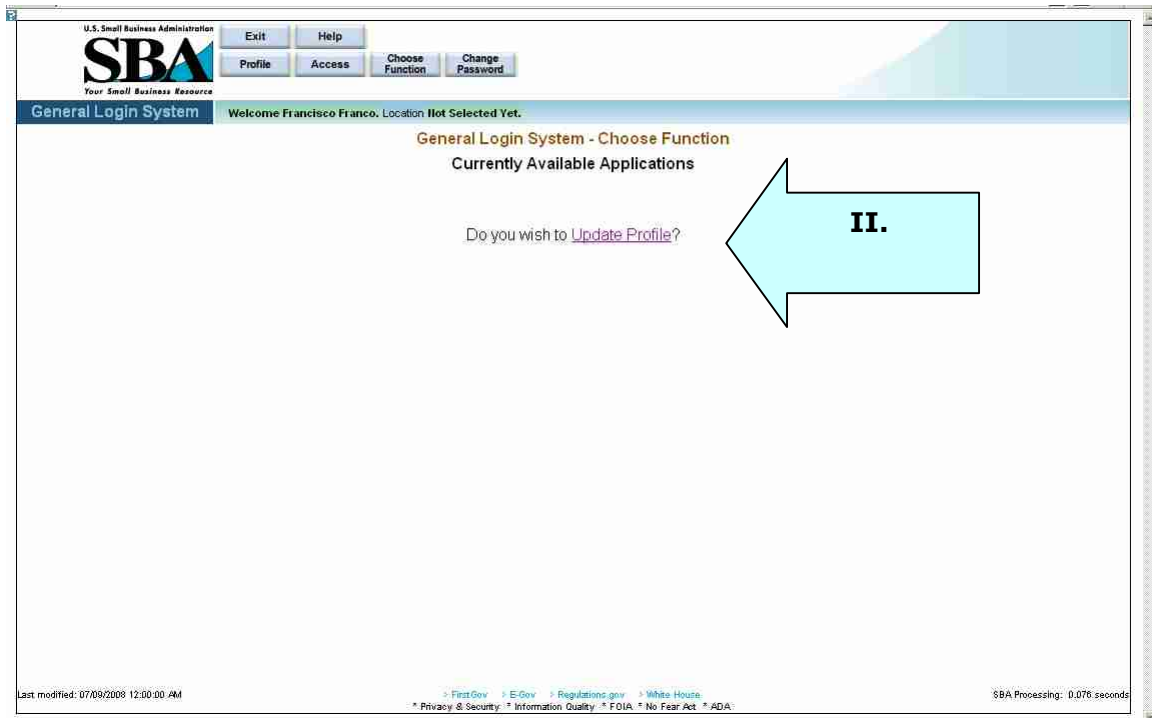
I. Click 'OK' on the 'Welcome' screen that appears.



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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.

U.S. Small Business Administration
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Exit Help
 Profile Access Choose Function Change Password

General Login System Welcome Francisco Franco. Location **Not Selected Yet.**

Profile

Name: (First) (Middle) (Last) (Suffix - Jr, Sr, I, II, etc.)
 Francisco [] Franco []

Country: UNITED STATES

Zip+4 Code: 20878 [] [] Lookup Zip

Street 1: 1234 Jones Street

Street 2: []

City Name: GAITHERSBURG MD (State)

Phone Number: (Country) (Area Code) (Phone Number) (Extension)
 (US is 1) (999-9999)
 1 [] 301 [] 333-6666 []

E-Mail Address: lafayette89@msn.com

Re-enter E-Mail: lafayette89@msn.com

Default Location Id: *

Business Information: No Business information found in the database

Last modified: 04/01/2009 12:00:00 AM
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 * Privacy & Security * Information Quality * FOIA * No Fear Act * ADA SBA Processing: 0.178 seconds

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Exit Help
 Profile Access Choose Function Change Password

General Login System Welcome Francisco Franco. Location **Not Selected Yet.**

Francisco [] [] Franco [] []

Country: UNITED STATES

Zip+4 Code: 20878 [] [] Lookup Zip

Street 1: 1234 Jones Street

Street 2: []

City Name: GAITHERSBURG MD (State)

Phone Number: (Country) (Area Code) (Phone Number) (Extension)
 (US is 1) (999-9999)
 1 [] 301 [] 333-6666 []

E-Mail Address: lafayette89@msn.com

Re-enter E-Mail: lafayette89@msn.com

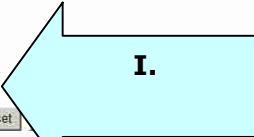
Default Location Id: *

Business Information: No Business information found in the database

Add New Business? Yes No

Reset

Last modified: 04/01/2009 12:00:00 AM
 > FirstGov > E-Gov > Regulations.gov > White House.
 * Privacy & Security * Information Quality * FOIA * No Fear Act * ADA SBA Processing: 0.178 seconds



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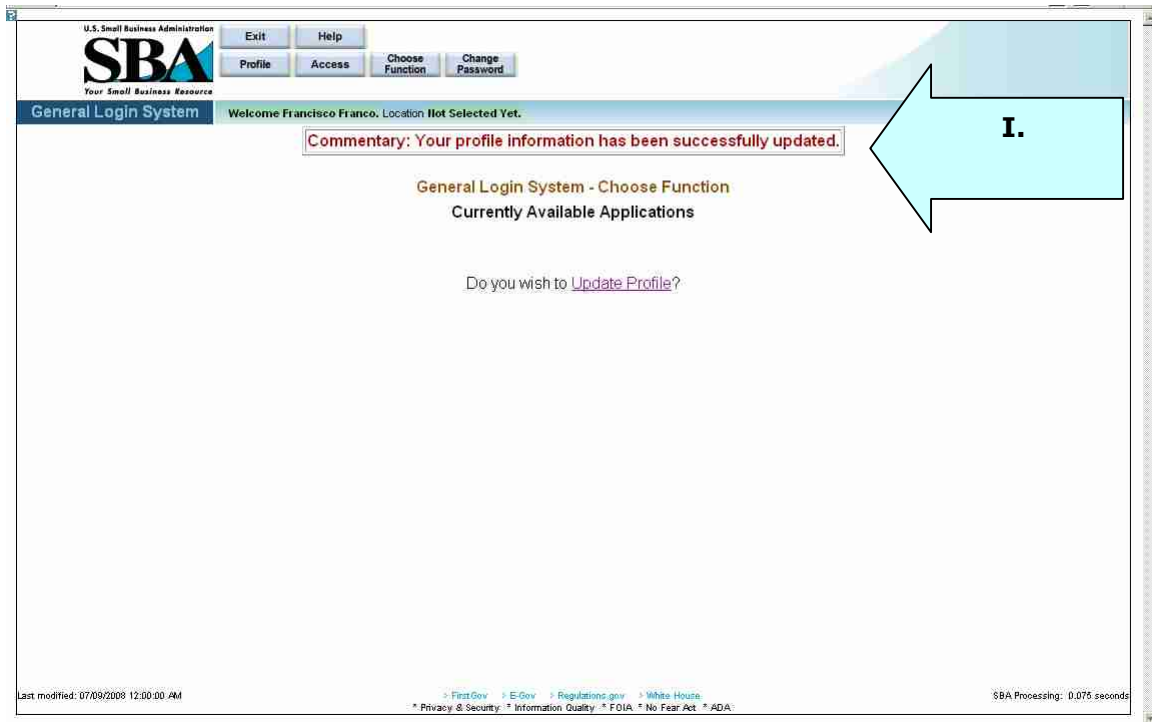
- I. Enter your firm's EIN and DUNS in the appropriate fields. These entries must match the corresponding entries in your firm's CCR/DSBS Profile. GLS must find matching entries in CCR/DSBS, or a firm will not be given access to the BDMIS. If the entries in GLS do not match the corresponding ones in 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.
- II. After the correct EIN and DUNS are entered, click on the 'Submit' button at the bottom of the page.

The screenshot shows the SBA General Login System interface. At the top, there are navigation buttons: Exit, Help, Profile, Access, Choose Function, and Change Password. Below these is a header with the SBA logo and the text "Welcome Francisco Franco, Location Not Selected Yet." The main form area contains the following fields and options:

- Zip+4 Code:** Input field with "120878" and a "Lookup Zip" button.
- Street 1:** Input field with "1234 Jones Street".
- Street 2:** Empty input field.
- City Name:** Input field with "GAITHERSBURG" and a dropdown menu showing "MD (State)".
- Phone Number:** A form with four input fields for (Country), (Area Code), (Phone Number), and (Extension). The values are "1", "301", "333-6666", and an empty field. A note "(US is 1)" is present.
- E-Mail Address:** Input field with "lafayette89@msn.com".
- Re-enter E-Mail:** Input field with "lafayette89@msn.com".
- Default Location Id:** Input field.
- Business Information:** A section with the text "No Business information found in the database". It includes a radio button for "Add New Business?" (Yes is selected) and two radio buttons for "EIN/SSN" (EIN(99-9999999) is selected) and "SSN(999-99-9999)". There are also input fields for "EIN/SSN" and "DUNS".

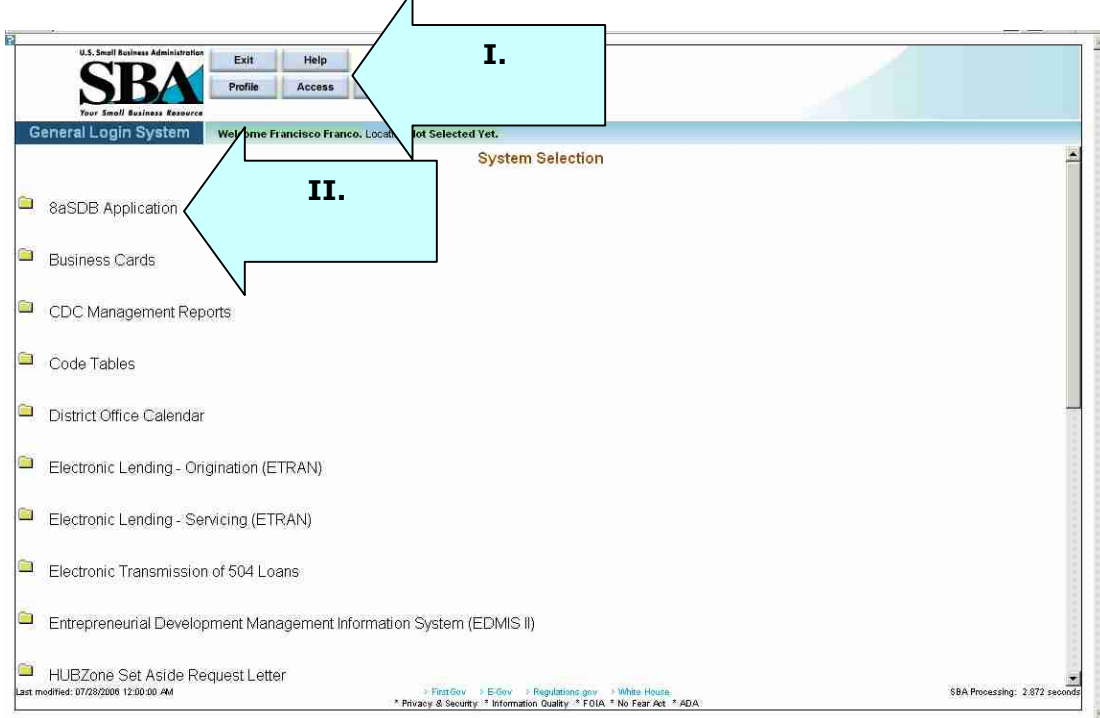
At the bottom of the form are "Reset", "Clear", and "Submit" buttons. Two large blue arrows labeled "I." and "II." point to the EIN/SSN and DUNS input fields respectively. The footer of the page includes "Last modified: 04/01/2008 12:00:00 AM" and "SBA Processing: 0.178 seconds".

- I. If GLS finds the matching entries in CCR, the Message "your profile information has been successfully updated" appears on the next screen.

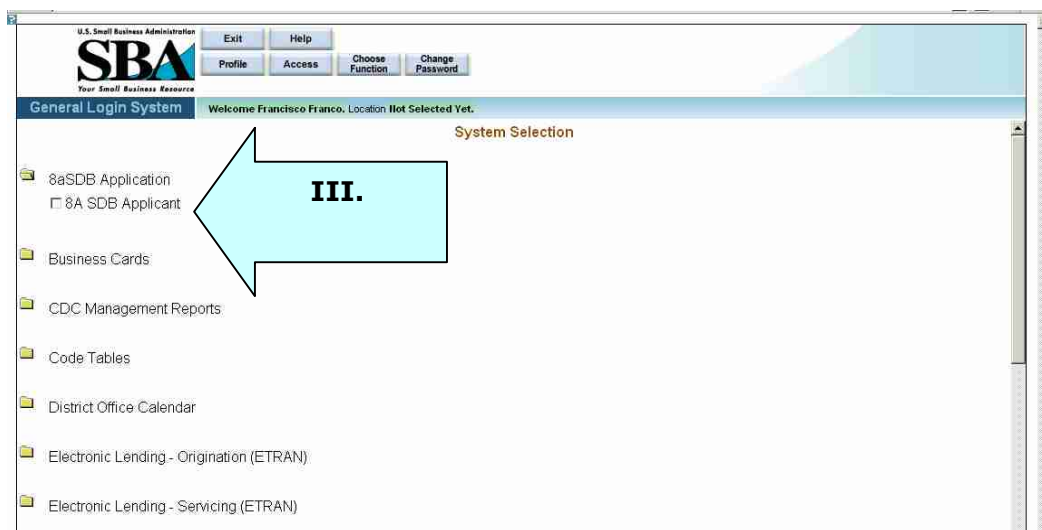


3.5. Request 8aSDB Application Access

- 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'.

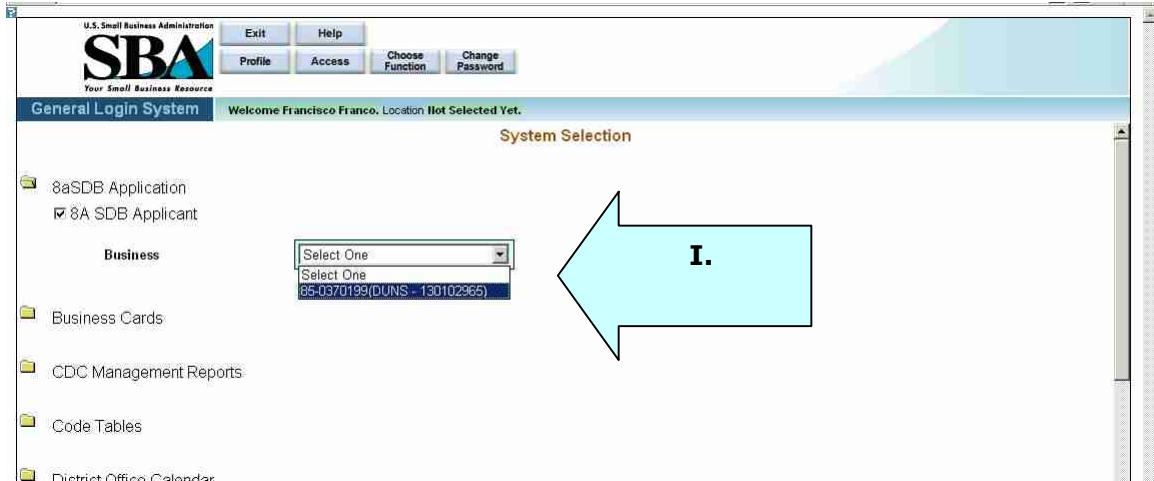


- III. A 'check box' appears entitled '8A SDB Applicant'. Check the box.

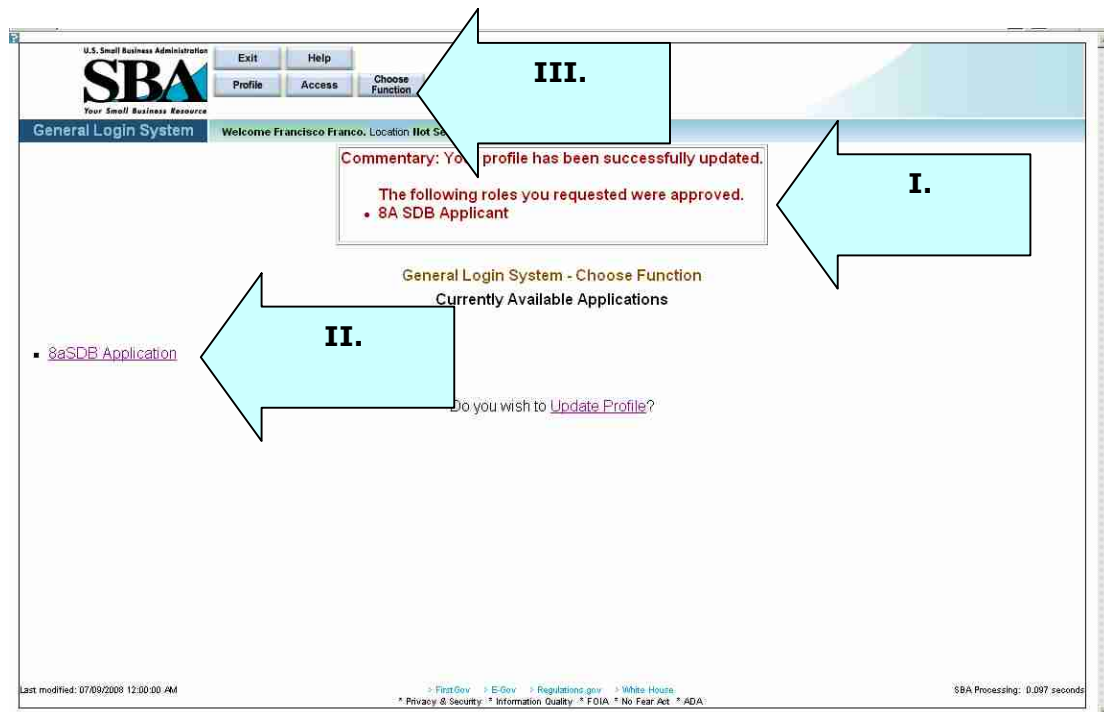


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- I. Next, a field with a drop-down menu will appear. Highlight in blue the line item that shows your EIN and DUNS numbers.
- II. Scroll to the bottom of the page and dick on 'Submit' (not pictured).

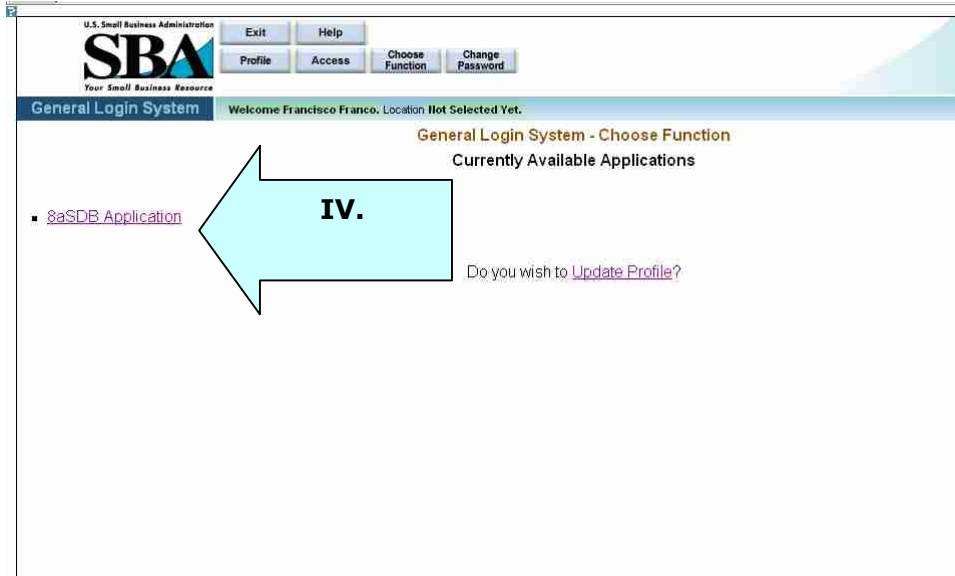


- I. The next screen should include a message indicating that an update was successful.
- II. The screen should also now show an active 'hot-link' entitled, '8aSDB Application'. Click on it to proceed to the application.
- III. If the '8aSDB Application' hot link does not appear, click on "Choose Function" at the top of the screen.



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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 for the purpose of applying for certification in the 8(a) Program. It provides the user with full access to the forms that must be completed to apply for 8(a) status.



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II. The typical Annual Review interface is similar. An example is shown below. Note the date in red that indicates when the firm's Annual Review is due.

SDA 8(a) & SDB Certification powered by simplicity

BARHENA INC

Overview Instructions

8(a) Program Annual Review
Your firm is due for annual review on Jun 25, 2008.

- 1 Complete Required Annual Review Forms**
 Please complete or update each form by answering the questions that appear when you click on 'Complete/Update Form' for each form below.
 You have completed 8 of 8 required forms. See below for [detailed status of each form.](#)
- 2 Assemble Supporting Documentation**
 You must include certain Supporting Documents to accompany your Annual Review forms. A Checklist is provided to help you organize this material. View and print out the Checklist by clicking on the appropriate button below. Once you have collected all the documents listed in the Checklist, sign it. Ensure it is included in the packet with the supporting documentation that you will mail-in to the SBA. Confirm this step by clicking on the appropriate button below.
View and Print Supporting Document Checklist

To continue, please confirm that you have collected all required supporting documentation and signed the checklist.
- 3 Submit On-Line Input**
- 4 Download, Print and Sign Completed Annual Review Forms**
 Review your completed Annual Review forms and verify that all the information is correct. Print it out and sign and date all forms in the appropriate signature blocks, including the attachment pages. Put the printed, signed and dated Annual Review forms in the packet with the Supporting Documentation and corresponding signed Checklist.
- 5 Mail Annual Review Forms, Supporting Documentation & Checklist to the SBA**

MY SBA FORMS

- ✓ Form 1450: 8(a) Annual Update
- ✓ Annual Compensation: John Chu Chu
- ✓ Annual Compensation: WILLIAM WARD
- ✓ Annual Compensation: Hubert A. Perry, Jr.
- ✓ Form 1010: Business Information
- ✓ Form 1010: Personal Information
- ✓ Form 1623
- ✓ Form 1700
- ✓ Form 912: John Chu Chu
- ✓ Form 912: WILLIAM WARD
- ✓ Form 912: Hubert A. Perry, Jr.
- ✓ Form 413: John Chu Chu
- ✓ Form 413: WILLIAM WARD
- ✓ Form 413: Hubert A. Perry, Jr.
- ✓ Form 4506-T: BARHENA INC
- ✓ Form 4506-T: John Chu Chu
- ✓ Form 4506-T: WILLIAM WARD
- ✓ Form 4506-T: Hubert A. Perry, Jr.

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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.

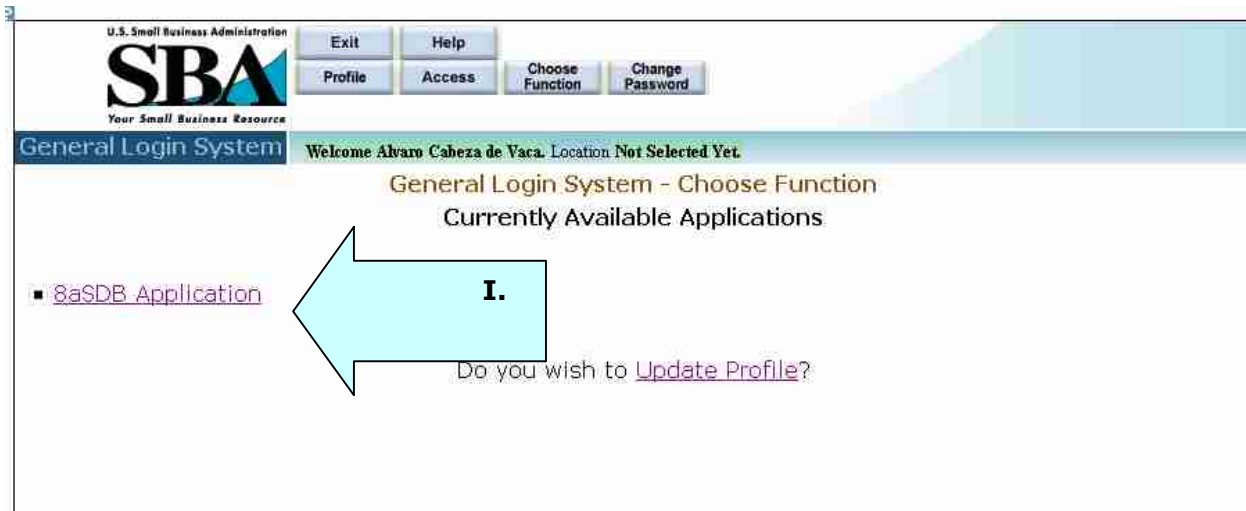
3.8. Help

- 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.

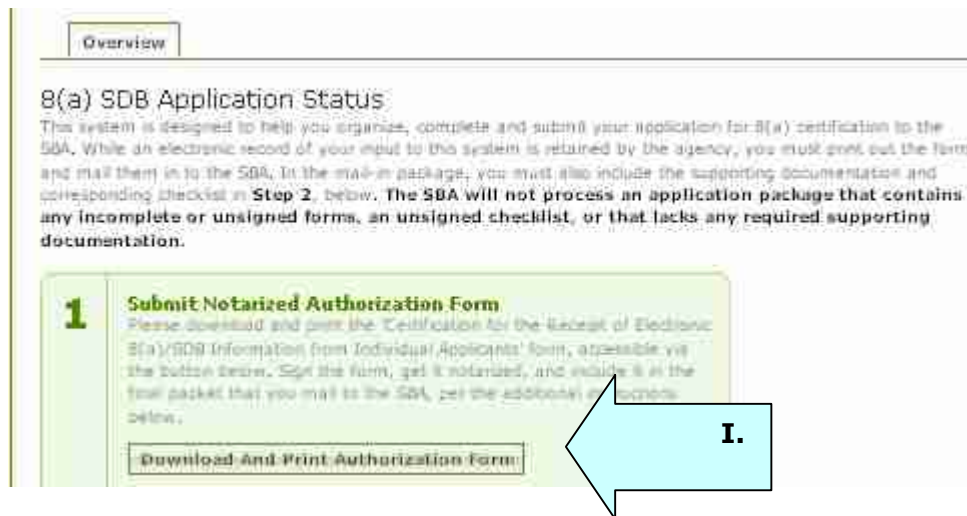


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Step 6: Mail Application, Supporting Documentation & Checklist to the SBA

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. Sign, get this form notarized, and retain it for submission with the overall package of materials (see below) that you mail to the SBA. (not shown)

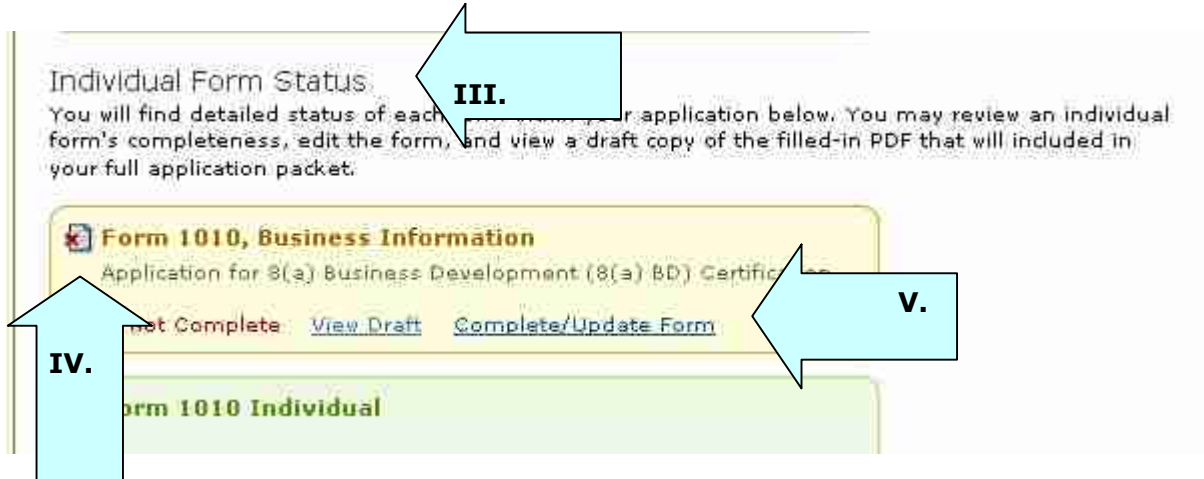


3.9.4. Step 2) Enter Forms / Edit Data

- I. In Step Two, you should complete all of the on-line forms required for certification or Annual Review.
- II. Click the link "detailed status of each form" to navigate to individual required forms.



- III. This takes you to 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. When forms are completed, they are marked with a green "checkmark". (not shown)
- V. Click "Complete/Update Form" to open the form for edits.



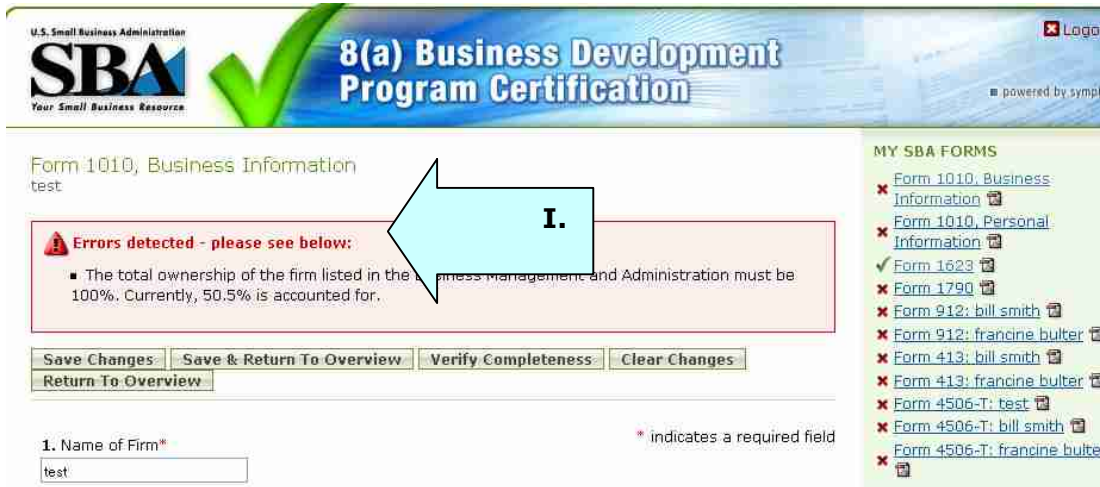
- VI. When a new application for 8(a) certification is launched in the system, the following forms are listed for the applicant to complete (not shown):
 - a. Form 1010, Business Information
 - b. Form 1010, Personal Information
 - c. Form 1623
 - d. Form 1790

(NOTE: Other forms, such as the Form 413 or Form 912, are dynamically created by the system, depending on the data entered in the Form 1010, Business Information.)

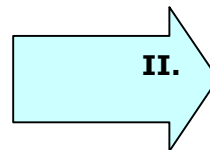
- I. When a form is open for edits, a red asterisk indicates that the field is a required field. You will not be able to complete the form until all required fields have been entered.
- II. Use the "Save Changes" button to save data in the online form. After use, remain on the form for further edits.
- 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.

The screenshot shows the '8(a) Business Development Program Certification' form. At the top, there is a navigation bar with the SBA logo and a 'Logout' button. Below the navigation bar, there are several buttons: 'Save Changes', 'Save & Return To Overview', 'Verify Completeness', 'Clear Changes', and 'Return To Overview'. The form contains several input fields, each with a red asterisk indicating it is a required field. The fields are: '1. Name of Firm*', '1. Telephone*', '2. Fax*', '3. Address*' (with sub-fields for '1. Street Address', '2. City*', '3. State*', '4. Zip*', and '5. County*'), and '4. Email*'. A legend on the right side of the form states '* Indicates a required field'. Six numbered callouts (I-VI) are overlaid on the form: I. points to the '3. Address*' field; II. points to the 'Save Changes' button; III. points to the 'Save & Return To Overview' button; IV. points to the 'Verify Completeness' button; V. points to the 'Clear Changes' button; and VI. points to the 'Return To Overview' button.

- 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 displays an overall red 'X' at this point, which indicates the form is still incomplete. To complete a form successfully, the user must enter all data and resolve all errors that appear in the form when the 'Verify Completeness' button is clicked. 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 applicable Federal regulations.
- II. For example, any owner claiming social disadvantage in the Form 1010 triggers the creation of Forms 413 and 912 for these individuals.
- III. Below is an example of the required forms that result if, in the Form 1010, Business Information, William Smith is listed as an owner claiming social disadvantage.
- IV. Below is an example of the required forms that result if, in the Form 1010 Business Information, Francine P. Butler and William Smith are both owners claiming social disadvantage.



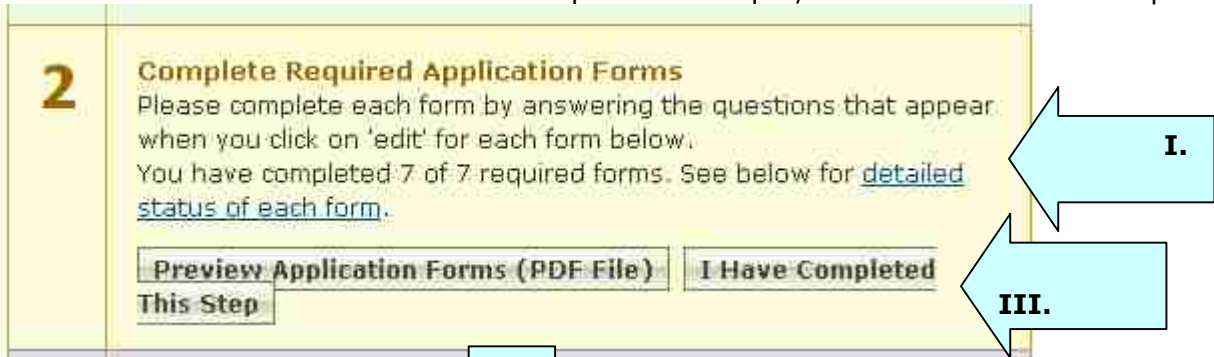
III.



IV.

(NOTE: 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.)

- I. 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'.
- II. If you click the "Preview Application Forms (PDF File) (PDF File) button, the forms will open in printable format (with DRAFT designation).
- III. Click on both buttons to confirm completion of Step 2, and activate the next step.



OMB Approval No. 3245-0331
 Expiration Date:

OMB Approval No. 3245-0331
 Expiration Date: 6/30/2010

**APPLICATION FOR ADMISSION TO THE 8(A) BUSINESS DEVELOPMENT (BD) PROGRAM
 OR CERTIFICATION AS A SMALL DISADVANTAGED BUSINESS (SDB)**

YOUR SIGNATURE ON THIS FORM INDICATES THAT YOU FULLY UNDERSTAND ALL QUESTIONS AND CERTIFIES THAT ALL RESPONSES AND DOCUMENTS ARE TRUTHFUL AND ACCURATE.

Name of Applicant Business Concern (include any trade or d.b.a. names): Advanced Technologies Consultants

Business Concern is Applying For (check one):

8(a) New SDB Business concern Only Recertified SDB Business concern Only*

(All 8(a) certified business concerns are automatically certified as SDBs)

** If the applicant business concern's SDB certification has been expired for more than 90 days, the business concern must check "new SDB Business Concern Only" and submit all documents required for new SDB certification applicants.*

INFORMATION ABOUT THE 8(a) AND SDB APPLICATION

This Form is to be completed by all 8a and SDB applicants.

Limitation on 8(a) BD Eligibility: A business concern can participate in the 8(a) BD Program only one time. Similarly, a socially and economically disadvantaged individual can use his or her disadvantaged status to qualify for the program only one time.

Authority to Collect Information: The U.S. Small Business Administration (SBA) is authorized to determine eligibility for the 8(a) Business Development (BD) Program under 13 C.F.R. Part 124, Subpart A and for Small Disadvantaged Business (SDB) certification under 13 C.F.R. Part 124, Subpart B. The information submitted on this SBA Form 1010 is used to determine the applicant's eligibility for one or both of these programs.

Disclosure of Information: SBA will keep the application and supporting documentation provided with the application confidential to the extent required by law. However, all information submitted in connection with this

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After all forms have been completed, each form will display a green checkmark (see below).

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 be included in your full application packet.

 Form 1010, Business Information Application for 8(a) Business Development (8(a) BD) Certification ✓ Verified Complete: View Draft Complete/Update Form
 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
 Form 912, Statement of Personal History ✓ Form 912: William H. Smith ✓ Form 912: Francine P. Butler ✓ Verified Complete
 Form 413, Personal Financial Statement ✓ Form 413: William H. Smith ✓ Form 413: Francine P. Butler ✓ Verified Complete
 Form 4506-T, Request for Transcript of Tax Return ✓ Form 4506-T: Advanced Technologies Consultants ✓ Form 4506-T: William H. Smith ✓ Form 4506-T: Francine P. Butler ✓ Verified Complete

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 that comprise the application for 8(a) certification or the Annual Review.
- II. The list displays a "red x" next to the form names when they are incomplete.

- III. After a form has been completed, the form will display a "green checkmark", indicating it has been completed and verified.

- IV. From the "My SBA Forms" navigation, click on the form link to begin entering data into the online form (see above).
- V. 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.
- VI. Use the "Save Changes" button to save data in the online form. After use, remain on the form for further edits.
- VII. Use the "Save & Return to Overview" button to save the data to the form, and to return to the application overview page.
- VIII. Use the "Verify Completeness" button to ensure all required fields have been answered.
- IX. Use the "Clear Changes" to revert the form to the last version that was saved.
- X. Use the "Return to Overview" button to return to the overview without saving.

U.S. Small Business Administration
SBA
 Your Small Business Resource

8(a) Business Development Program Certification

Logout

powered by simplicity

Business Information

Save Changes Save & Return To Overview Verify Completeness Clear Changes Return To Overview

1. Name of Firm* * indicates a required field

Section I: Business Profile

1. Telephone*

2. Fax*

3. Address*

1. Street Address

2. City*

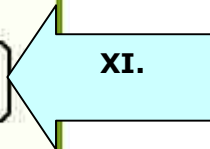
3. State* 4. Zip* 5. County*

4. Email*

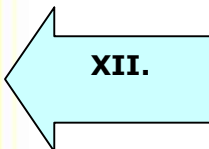
As the applicant enters data into the online forms, especially the 'Form 1010, Business Information,' the system creates additional forms as warranted by applicable Federal regulations. For example, any owner claiming social disadvantage in the Form 1010 triggers the creation of Forms 413 and 912 for this individual.

XI. Below is an example of the required forms that result if, in the Form 1010 Business Information, William Smith is listed as an owner claiming social disadvantage.

XII. Below is an example of the required forms that result if, in the Form 1010 Business Information, Francine P. Butler and William Smith are both owners claiming social disadvantage.



XI.



XII.

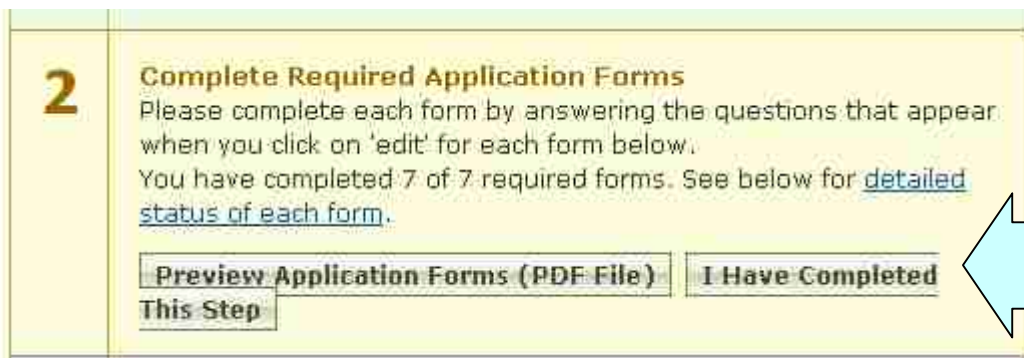
- I. When the 'Verify Completeness' button is clicked, any missing data is highlighted at the top of the page in an "errors detected" box outlined in red. The form shows a red 'X' at this point, which indicates the form is still incomplete. To complete a form successfully, the user must enter all data and resolve all errors in the form highlighted by clicking the 'Verify Completeness' button. 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 displays a green 'checkmark' on the Overview page, or the 'My SBA Forms' section on any page (example at right).



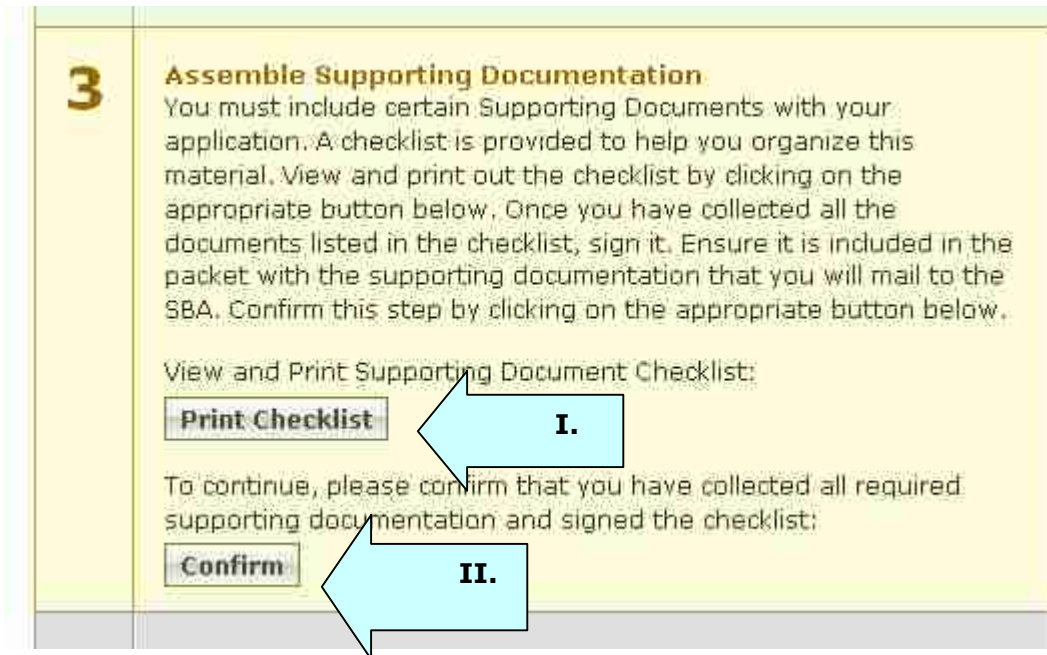
- III. Once all forms are "verified completed" and show the corresponding green checkmarks, the online application is ready to be submitted electronically to the SBA (example at right).
- IV. Applicants can make edits to forms until the application is submitted. If changes are made in any form, be sure 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.



AR 52.227-14.

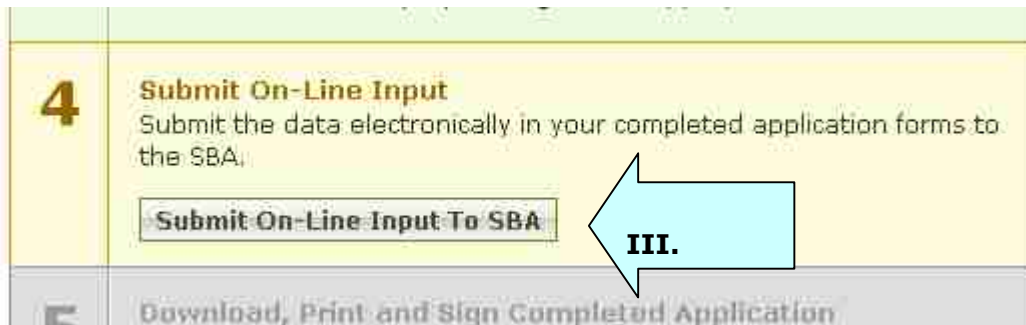
3.9.6. Step 3) Assemble Supporting Documentation

- 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. 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.
- II. To Confirm completion of this step, click on the "Confirm" button.



3.9.7. Step 4) Submit On-Line Input

- III. 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

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

- I. 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.
- II. When finished, click the "I have signed and Dated All Documents Where Appropriate" button to confirm this step is complete.

5 **Download, Print and Sign Completed Application**
Review your completed application and verify that all the information is correct. Print it out and sign and date all forms in the appropriate signature blocks, including the attachment pages. Put the printed, signed and dated application forms in the packet with the Supporting Documentation and corresponding signed Checklist.

Download, View And Print Completed Application Forms

Download And Print Supporting Document Checklist

I Have Signed And Dated All Documents Where Appropriate

I.

II.

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 the completion of this step.

6 Mail Application, Supporting Documentation & Checklist to the SBA
Mail the completed full Application, Checklist, and Supporting Documents to the SBA at the address shown below:

Small Business Administration
Division of Program Certification and Eligibility
Robert N.C. Nix Federal Building
900 Market Street, 5th Floor
Philadelphia, PA 19107

I Have Mailed The Completed Packet To The SBA

Individual Form Status

- 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. (Not shown)

6 Mail Application, Supporting Documentation & Checklist to the SBA
Mail the completed full Application, Checklist, and Supporting Documents to the SBA at the address shown below:

Small Business Administration
Division of Program Certification and Eligibility
Robert N.C. Nix Federal Building
900 Market Street, 5th Floor
Philadelphia, PA 19107

Thank you for submitting your application and supporting documentation to the SBA!! Once the SBA receives the packet from you with the signed forms, checklist and supporting documentation, you will receive a confirmation that it is being processed. Subsequent communications from the SBA will be forthcoming as warranted.

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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'

Once the SBA receives the packet from you with the signed forms, checklist and supporting documentation, you will receive a confirmation that it is being processed. Subsequent communications from the SBA will be forthcoming as warranted.

7 **Request Reconsideration by SBA**
You may request a reconsideration by SBA within 45 days of the denial decision. You have until **Oct 09, 2008** to request reconsideration.

[Request Reconsideration](#)

I.

Individual Form Status

You will find detailed status of each form within your application below. You may review an individual form's status and download the form if necessary. The SBA will notify you of any updates to the status of your forms.

4. 8(a) Program Annual Review

4.1. Returning Users - Logon

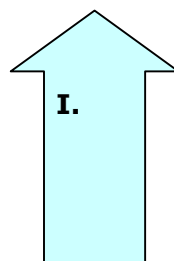
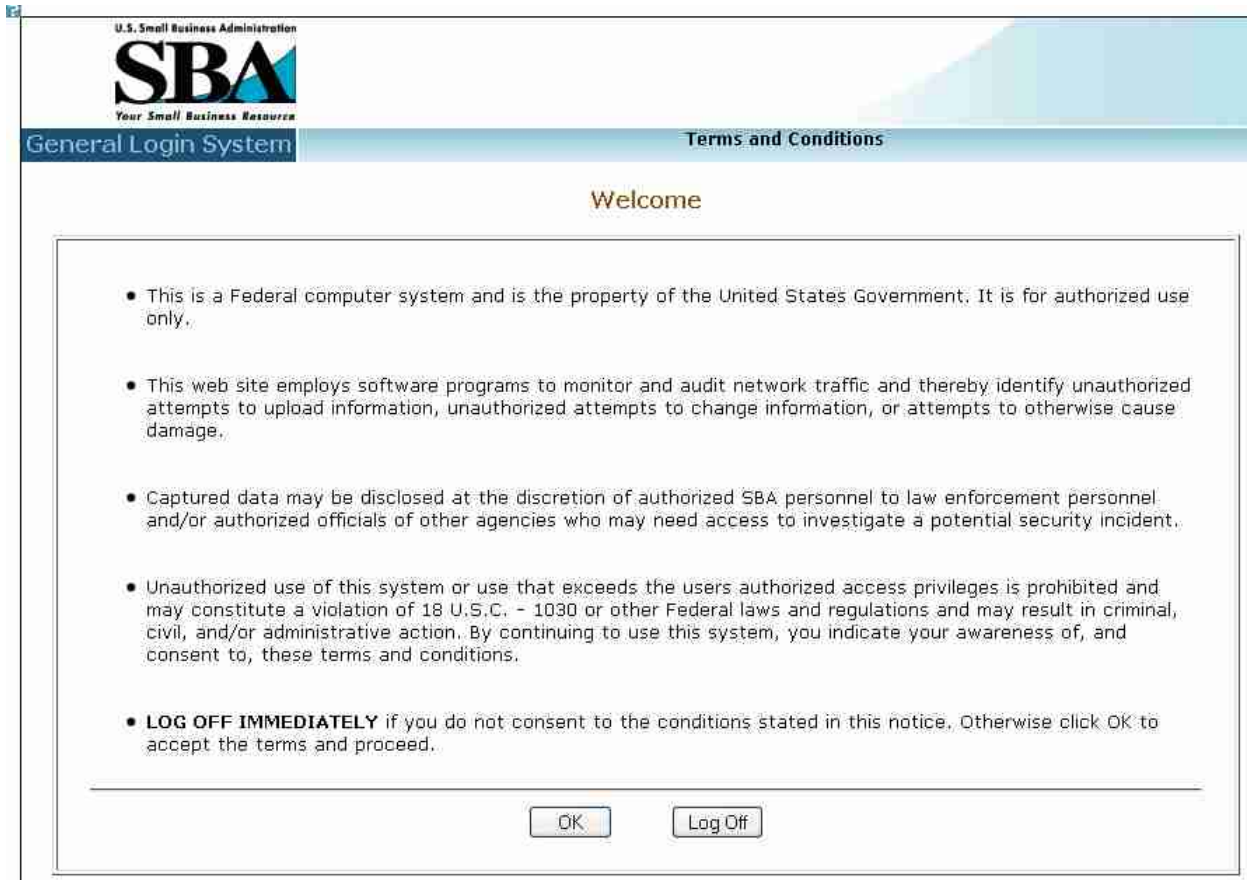
One year after an approval has been granted, firms are prompted to complete the steps required to complete their 8(a) Program Annual Review. A firm is required to undergo this review on an annual basis to maintain eligibility for the program. The maximum program tenure for any firm is nine years. When completing and submitting forms for the Annual Review, a returning firm is shown 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>. (Not shown)
- 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 in previous sections 3.3, 3.4 and 3.5. 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.

The screenshot shows the SBA General Login System interface. At the top, it displays the SBA logo and the text "U.S. Small Business Administration" and "Your Small Business Resource". A "Help" button is located in the top right corner. The date "November 03, 2008" is shown in the top right. The main navigation bar is on the left, with a "General Login System" header and a list of links: "Forgot User ID?", "Forgot Password?", "Instructions for GLS", "Request SBA User ID", and "Contact SBA Security". The main content area is titled "SBA Account Login" and contains a "User ID:" field, a "Password:" field, a "Login" button, and a "Clear" button. A "Text Only" link is located below the login buttons. Three cyan arrows with black outlines point to specific elements: Arrow II points to the left navigation bar; Arrow III points to the User ID and Password input fields; Arrow IV points to the Login button.

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- I. Once a user has logged onto the system, a 'Terms of Use' screen is presented. To accept the terms of use, click the 'OK' button. 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.

The screenshot displays the SBA 8(a) & SDB Certification interface for BARHENA INC. The page is titled "8(a) Program Annual Review" and indicates that the firm is due for an annual review on Jun 25, 2008. A blue arrow labeled "I." points to this due date information. The main content area is divided into five numbered steps: 1. Complete Required Annual Review Forms (highlighted in green), 2. Assemble Supporting Documentation, 3. Submit On-Line Input, 4. Download, Print and Sign Completed Annual Review Forms, and 5. Mail Annual Review Forms, Supporting Documentation & Checklist to the SBA. The right sidebar, titled "MY SBA FORMS", lists various forms such as Form 1450, 8(a) Annual Update, and Form 4506-T, all marked as completed with checkmarks.

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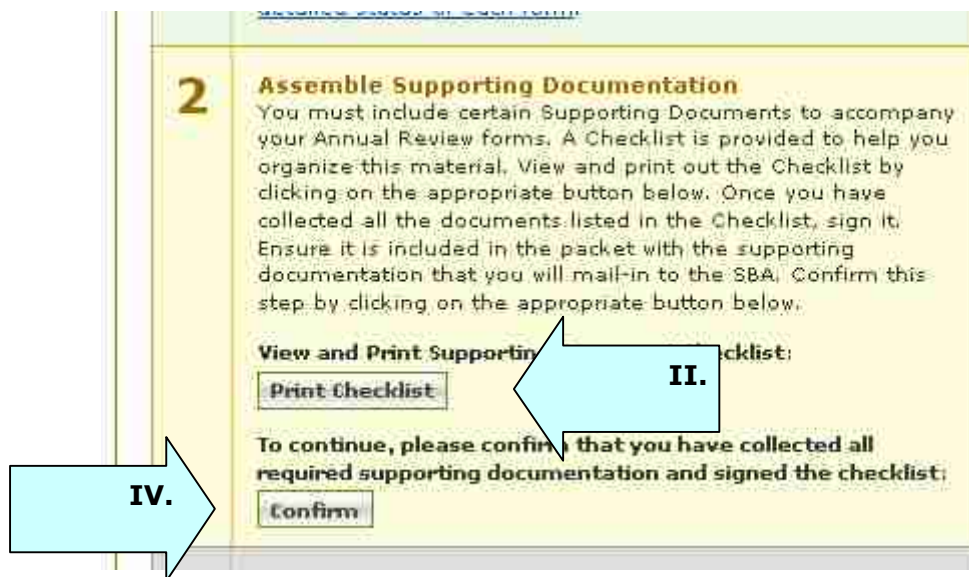
4.1.1. Step 1) Complete Required Annual Review Forms

- I. The required Annual Review forms are shown in the center section of the Overview page, under the heading entitled 'Individual Form Status'. 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. Incomplete forms will display a "red X".
- III. Completed forms will appear with a "green checkmark".



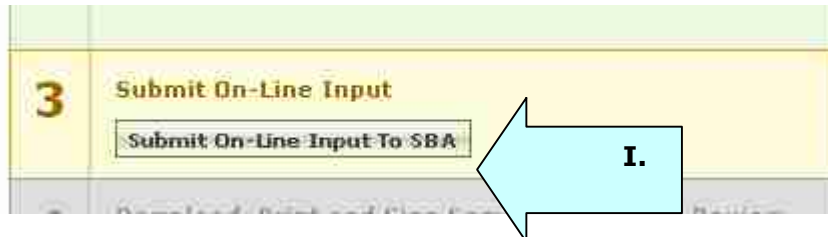
4.1.2. Step 2) Assemble Supporting Documentation

- 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.

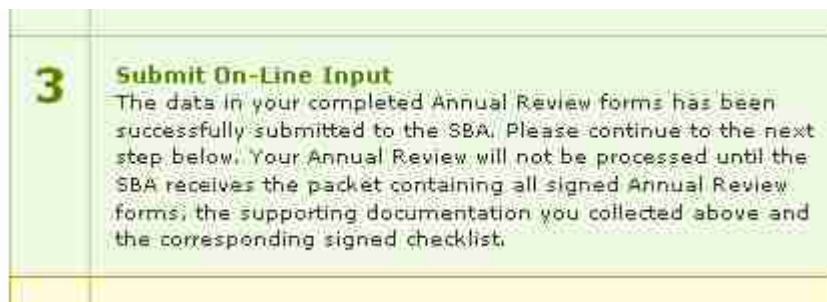


4.1.3. Step 3) Submit On-Line Input

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

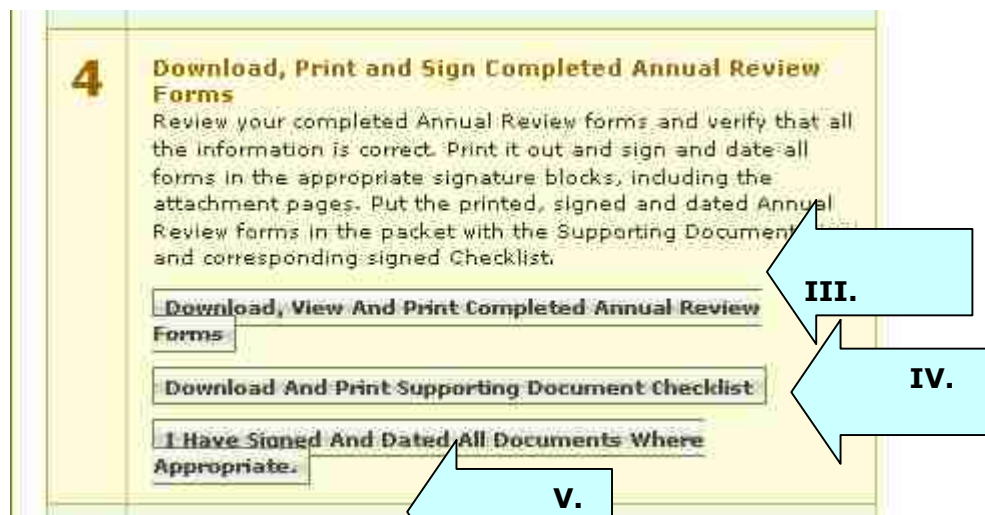


- II. Once an applicant has submitted the required on-line data, Step 3 will display a confirmation message. (Shown below)



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.



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



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



- 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. Subsequent communications about approval, denials, or other requests from the SBA will be forthcoming as warranted. (Not Shown)

END OF DOCUMENT