

SBA 8(A) DATA CALL QUESTIONS & ANSWERS

Q. What three fiscal years are supposed to be covered? Our interpretation is that for companies that use a calendar year as their fiscal year, that the data call requests would include years 2024, 2023, and 2022, but not 2025 as this year is not yet complete. For companies that use a different fiscal year, they should be gathering the documents based on the three most recently completed fiscal years, which may include data for 2025 (i.e., fiscal years of October 1, 2024 - September 30, 2025; October 1, 2023 - September 30, 2024; and October 1, 2022 - September 30, 2023).

A. The last three (3) closed fiscal years of each respective participant are required. It is not the government fiscal year, it is the individual participant's fiscal year.

Q. Regarding IRS Form 4506, is Form 1065 what is being requested? I don't know how long it will take for the returns to be sent so if they are to be sent to SBA as a third party whose name, address, and phone number should I include on the form? Should the completed form be sent to SBA for submission to IRS and, if so, will SBA pay the fees?

A. No, Form 1065 is not being requested. Form 4506 should be completed (and uploaded) to authorize the SBA to receive previously filed Form 1040 (or equivalent) and Form 941 for tax filing years 2023, 2024 and 2025.

Q. Some reports, the General Ledger in particular, are available to me only in Excel or PDF. Is one of those formats acceptable? I am told Excel spreadsheets can be converted to CSV but they don't look very good.

A. All excel spreadsheets should be convertible to CSV without any loss of data or formatting.

Q. Regarding the Sub-Ledger Schedule reports, there are no Account Payable or Account Receivable balances, nor is there a Sub Ledger for P&L accounts. Can these reports be omitted?

A. If there is no subledger, you do not need to provide it, please provide a brief explanation about why it does not exist and attest to its absence.

Q. How do I report my classified 8(a) contracts?

- A. A check-box indicator is included in the contracts section of the 8(a) Data Call in the Certifications portal for you to indicate:
- 1) that you are withholding upload of 8(a) contracts which are classified; and
 - 2) that you attest to the compliance of your sub-contracts to all applicable 8(a) rules under those withheld classified contracts.

Q. Concerning Exhibit A, item 9, “Copy of all 8(a) Contracts on which the firm is currently working for the last three full fiscal years,” Does this include sole source purchase orders?

- A. Yes, any award made based on the 8(a) status of the business should be submitted.

Q. What do I do if I have just gotten my first contract and have not gained any revenue to provide financial documents?

- A. Businesses without any history of revenue should submit a statement attesting to this for each prompt and then complete the Attest and Submit steps.

Q. With SBA’s approval, we purchased an individual-owned 8(a). The prior owner fully complied with SBA’s annual review requirements, but it generated no revenue. Further there has been no revenue, nor operating expense activity since the purchase. How would SBA like us to respond to the data request?

- A. Businesses without any history of revenue should submit a statement attesting to this for each prompt and then complete the Attest and Submit steps.

Q. Does SBA want all sheets from the ledger or just a summary?

- A. All sheets

Q. What if I didn’t receive the letter from SBA but I am a certified 8(a) and believe that I should have?

- A. Send to certifications@sba.gov your Company Name and UEI as they are registered in SAM.gov, as well as your primary majority owner first name and last name (or if an entity-owned 8(a), the president of your subsidiary) and associated email. SBA will determine to whom the letter was sent and ensure any contact information corrections are made so that the business may submit its financial information.

Q. Where can I send a request for due date extension?

A. The due date has been extended to January 19, 2026.

Q. How do I upload the requested documents?

A. Log in to <https://certifications.sba.gov> and follow the on-screen prompts. If you have not yet created an account and claimed your business in the new system, you will need to do this before you will see the 8(a) Data Call prompt.

Q. Where can I get assistance with clarification on the documents requested?

A. Businesses may submit questions to certifications@sba.gov or call 866-SBA-Help (866-722-4357).

Q. SBA's letter requires some documents in CSV format, but the Certifications system only allows PDFs. How can businesses upload the required format?

A. The Certifications system is programmed to allow CSV uploads for the items specified in Exhibit A of the SBA letter.