

SDVOSB VETCERT APPLICATION CHECKLIST

Step-by-step guide to certifying your Service-Disabled Veteran-Owned Small Business

Produced by OperatorToOwner.com — Plain-language resources for veteran entrepreneurs

Why This Checklist Exists

In January 2023, the SBA eliminated SDVOSB self-certification. All SDVOSBs must now certify through the VA's VetCert portal. The process has several moving parts — documents spread across agencies, strict eligibility rules, and a portal that trips up even experienced business owners. This checklist walks you through every step so you don't miss anything and don't have to figure it out by trial and error.

SECTION 1 — CONFIRM ELIGIBILITY BEFORE YOU START

Do not start your application until all boxes below are checked. Submitting without meeting these requirements will result in a denial.

- ☐ You are a U.S. Citizen
Non-citizens and permanent residents are not eligible.
- ☐ You have a service-connected disability rating from the VA
Any rating (0% or higher) qualifies — it does not need to be a specific percentage.
- ☐ You own 51% or more of the business
Ownership must be unconditional and direct.
- ☐ You control day-to-day operations and long-term decisions of the business
"Control" is evaluated carefully. You must be in charge — not a non-veteran manager.
- ☐ Your business qualifies as a "small business" under SBA size standards
Size limits vary by NAICS code. Look up your primary NAICS code at [sba.gov/size-standards](https://www.sba.gov/size-standards).
- ☐ Your business is organized as a for-profit entity
Non-profits are not eligible.
- ☐ Your business has its principal office in the U.S.
Home-based businesses qualify if the home office is your primary place of business.

SECTION 2 — GATHER YOUR DOCUMENTS

Collect these before opening the VetCert portal. Having everything ready prevents mid-application scrambling and reduces processing delays.

Your Personal Documents

- ☐ DD-214 (Certificate of Release or Discharge from Active Duty)
Must show character of discharge. If lost, request at archives.gov/veterans/military-service-records.
- ☐ VA Rating Decision Letter confirming your service-connected disability
Must clearly show your name and the disability rating. Obtain via va.gov or your regional VA office.
- ☐ Government-issued photo ID (driver's license or passport)
- ☐ Social Security Number (SSN) or EIN — have both on hand

Business Formation Documents

- ☐ Articles of Organization (LLC) or Articles of Incorporation (Corporation)
Issued by your state at formation. Obtain a certified copy from your state Secretary of State if needed.
- ☐ Operating Agreement (LLC) or Corporate Bylaws (Corporation)
Must clearly show ownership percentages and who has management authority.
- ☐ Current list of all owners / members / shareholders with percentages
- ☐ Business licenses or permits (if your state or locality requires them)
- ☐ EIN Confirmation Letter from the IRS (Form CP 575 or 147C)
Request a 147C letter by calling IRS Business & Specialty Tax Line: 800-829-4933.

Financial Documents

- ☐ Most recent 3 years of business tax returns (or all years if under 3 years old)
If not yet filed, include a CPA-prepared statement or profit/loss statement.
- ☐ Most recent personal tax return (Form 1040)
The VA uses this to assess personal financial picture and business control.
- ☐ Current business bank statements (last 3 months)
- ☐ Financial statements: Balance Sheet and Profit & Loss Statement
Can be prepared by you, your accountant, or accounting software (QuickBooks, etc.).

SECTION 3 — SET UP SAM.GOV (REQUIRED BEFORE VETCERT)

You must have an active SAM.gov registration before the VA can complete your VetCert review. This is a hard requirement — not optional.

- ☐ Create a Login.gov account at login.gov
SAM.gov now requires Login.gov for access. Use an email you check regularly.
- ☐ Register your business at SAM.gov using your Login.gov credentials
Go to sam.gov → Sign In → Register Entity. You'll need your EIN and NAICS codes.
- ☐ Identify your primary NAICS code(s)
NAICS codes define what your business does. Look yours up at census.gov/naics.

- ☐ Complete all required SAM.gov sections (Core Data, Assertions, Representations & Certifications)
The system will walk you through each section. Do not skip any.
- ☐ Submit SAM.gov registration and wait for activation
Activation typically takes 7–10 business days. You'll receive an email when active.
- ☐ Note your CAGE Code (assigned after SAM.gov activation)
You'll need this for VetCert and future contract bids.
- ☐ Confirm SAM.gov status shows "Active" before proceeding to VetCert

Pro Tip: SAM.gov registration is free. If anyone offers to register you for a fee, it's a scam. The only official site is sam.gov.

SECTION 4 — COMPLETE THE VETCERT APPLICATION

Once SAM.gov is active, you're ready to apply at VA's VetCert portal.

- ☐ Go to vetbiz.va.gov and create or log in to your account
Use the same Login.gov credentials from SAM.gov.
- ☐ Start a new SDVOSB certification application
Select "Service-Disabled Veteran-Owned Small Business" — not just VOSB.
- ☐ Enter your business information (legal name, EIN, DUNS/UEI, SAM.gov CAGE Code)
- ☐ Enter all owners/members and their veteran/disability status
- ☐ Upload your DD-214
- ☐ Upload your VA Rating Decision Letter
- ☐ Upload your Operating Agreement or Bylaws
- ☐ Upload your Articles of Organization or Incorporation
- ☐ Upload required financial documents as prompted by the portal
- ☐ Review all entries carefully before submitting
Errors or missing documents are the #1 cause of delays. Read every page before hitting Submit.
- ☐ Submit application and record your application/confirmation number
Write this down or screenshot it. You'll need it to track status.
- ☐ Monitor your email for VA review requests or requests for additional info
The VA may request additional documents. Respond within their stated timeframe.

SECTION 5 — AFTER YOU'RE CERTIFIED

Certification is just the beginning. Here's what to do next.

- ☐ Save your certification letter from the VA
- ☐ Verify your SDVOSB status shows correctly in SAM.gov
It should auto-update, but confirm within a few weeks.
- ☐ Mark your calendar: SDVOSB certification must be renewed annually
Set a reminder 60 days before your expiration date so you're never caught lapsed.
- ☐ Update your business website and marketing materials with your SDVOSB certification
Add the official badge and language — it's a credibility signal for contracting officers.
- ☐ Register on additional procurement platforms (beta.SAM.gov, GSA Advantage, etc.)
These expand your visibility to federal buyers beyond the basic SAM.gov listing.
- ☐ Build your Capability Statement (1-page document describing your business for contracting officers)
This is your business card in federal contracting. You'll need it for every outreach.
- ☐ Research SDVOSB set-aside contracts in your NAICS codes at sam.gov/opportunities
Filter by "Set-Aside: Service-Disabled Veteran-Owned Small Business" to find your targets.

QUICK REFERENCE — KEY LINKS & CONTACTS

VetCert Portal	vetbiz.va.gov
SAM.gov Registration	sam.gov
Login.gov (required for both)	login.gov
SBA Size Standards Tool	sba.gov/size-standards
NAICS Code Lookup	census.gov/naics
Military Records Request	archives.gov/veterans/military-service-records
VA Rating Decision / Benefits	va.gov / 800-827-1000
IRS EIN Confirmation (147C)	800-829-4933
SBA Veteran Business Resources	sba.gov/business-guide/grow-your-business/veteran-owned-businesses

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