



U.S. Small Business
Administration

beta.Certify.sba.gov
Applicant User Guide

July 2020

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1.0 Welcome to beta.Certify.sba.gov

beta.Certify.sba.gov enables Women-Owned Small Businesses (WOSBs) and Economically Disadvantaged Women-Owned Small Businesses (EDWOSBs) to manage eligibility documents for the WOSB Federal Contract Program more efficiently. The U.S Small Business Administration (SBA) has a variety of programs to assist small businesses compete for federal contracts. beta.Certify.sba.gov enables WOSBs and EDWOSBs to organize, complete, and submit applications to the SBA for federal government contracting and business development program certifications.

1.1 Background and Scope

beta.Certify.sba.gov is technically enhanced for managing the certification process of WOSB/EDWOSB program applications. The scope of this beta.Certify.sba.gov WOSB user guide is to provide detailed assistance and guidance on how to utilize the primary functions of this system. This manual includes screenshots and descriptions of the system functions and capabilities, step-by-step procedures for system access and use, and contingencies and alternate modes of operation.

1.2 Who is beta.Certify.sba.gov for?

beta.Certify.sba.gov is for:

- Individual(s) of the qualifying Firm who are applying for SBA small business programs
- Individual(s) of the qualifying Firm who are eligible to join the Woman-Owned Small Business (WOSB) Program.

2.0 Let's Get Started!

2.1 Logging In

This section explains how to complete an authenticated login into the SBA portal. New users should create an account before signing into the portal. Existing users should log into the portal, using the credentials provided during the account creation process.

2.1.1 Create an Account

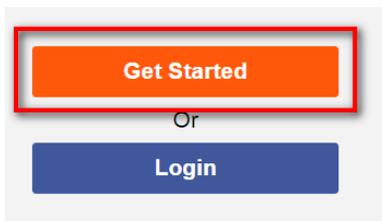
New Users should have the following details to create an SBA account:

1. A DUNS Number for the business
2. A completed registration in the System for Award Management (SAM)

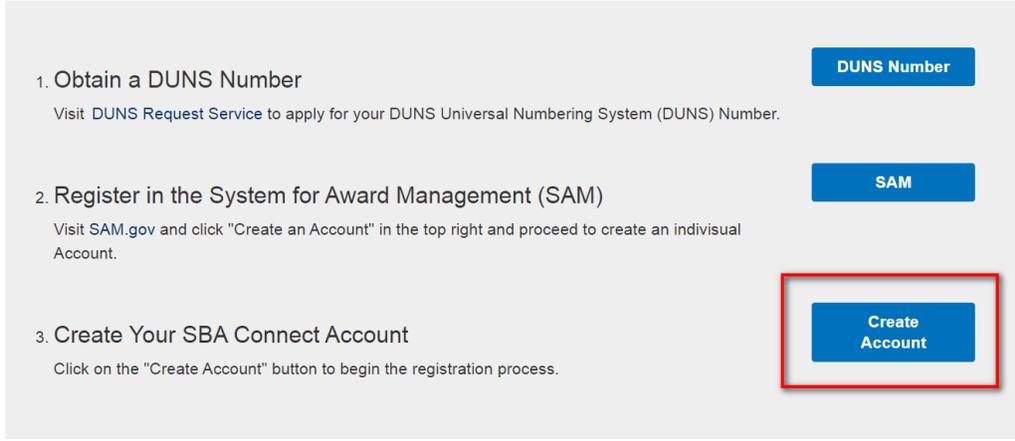
The user can access the account creation page through two methods:

Method 1:

- I. Click the 'Get Started' button



II. Click the 'Create Account' button



- III. Click the 'Accept' button in the 'Terms and Conditions' page
- IV. The Login.gov page should appear. Click the 'Create an account' button

Email address

Password Show password

Sign in

Create an account

Method 2:

- I. Click the 'Login' button
- II. Click the 'Accept' button in the 'Terms and Conditions' page
- III. The Login.gov page should appear. Click the 'Create an account' button

The following instructions help to create the SBA account:

- I. Enter the email address
- II. Click the 'Submit' button

Enter your email address

Email address

- III. An email with the link to create an account is sent to the email address provided during account creation, and the portal should display the below message

Check your email

We sent an email to **iamjohn53@outlook.com** with a link to confirm your email address. Follow the link to continue creating your account.

Didn't receive an email? [Resend](#)

Or, [use a different email address](#)

You can close this window if you're done.

- IV. Log in to the email address provided during account creation and view the email from login.gov
- V. Click the 'Confirm email address' button or the link given in the email



Confirm your email

Thanks for submitting your email address. Please click the link below or copy and paste the entire link into your browser. This link will expire in 24 hours.



https://idp.int.identitysandbox.gov/sign_up/email/confirm?_request_id=26681b1b-b726-494e-ba7f-eb1272012f3d&confirmation_token=kRwHbYcfx8RGJyzv3Lx

- VI. Click the button or the link to open up the create password page:
 1. Enter a secure password (Click the password safety tips link or '+ icon' to view safety tips)
 2. Click the 'Continue' button

✓ You have confirmed your email address

Create a strong password

It must be at least 12 characters long and not be a commonly used password. That's it!

Show password

Password

1

Password strength: ...

2 **Continue**

Password safety tips +

- VII. After creating the password, set up the second authentication method:
1. Choose the preferred second authentication method from the options list
 2. Click the 'Continue' button

✓ You have confirmed your email address

Create a strong password

It must be at least 12 characters long and not be a commonly used password. That's it!

Show password

Password

1

Password strength: ...

2 **Continue**

Password safety tips +

Select an option to secure your account:

Authentication application

Get codes from an app on your phone, computer, or tablet. Recommended because it is harder to intercept than texts or phone calls.

MORE SECURE

Security key

Use a security key that you have. It's a physical device that you plug in or that is built in to your computer or phone (it often looks like a USB flash drive). Recommended because it is more phishing resistant.

MORE SECURE

Phone

Get security codes by text message (SMS) or phone call

SECURE

Government employee ID

Insert your government or military PIV or CAC card and enter your PIN

SECURE

Backup codes

We'll give you 10 codes. You can use backup codes as your only authentication method, but it is the least recommended method since notes can get lost. Keep them in a safe place.

LESS SECURE



- VIII. Confirm the chosen method in the next page by clicking the 'Continue' button
- IX. If needed, change the mode by clicking on the link 'Choose a different method'

Note: Users should utilize this second authentication method whenever logging in with the credentials

2.1.2 Existing User Login

- I. Go to the URL beta.Certify.sba.gov
- II. Click the **Login** button



- III. Click the 'Accept' button on the 'Terms and Conditions' page

Terms and Conditions

- You are accessing a U S Government information system, which includes (1) this computer, (2) this computer network, (3) all computers connected to this network, and (4) all devices and storage media attached to this network or to a computer on this network. This information system is provided for U.S. Government-authorized use only.
- Unauthorized or improper use of this system may result in disciplinary action, as well as civil and criminal penalties.
- By using this information system, you understand and consent to the following:
 - You have no reasonable expectation of privacy regarding any communications or data transiting or stored on this information system. At any time, the government may for any lawful government purpose monitor, intercept, search and seize any communication or data transiting or stored on this information system.
 - Any communications or data transiting or stored on this information system may be disclosed or used for any lawful government purpose.
 - Your consent is final and irrevocable. You may not rely on any statements or informal policies purporting to provide you with any expectation of privacy regarding communications on this system, whether oral or written, by your supervisor or any other official, except SBA's Chief Information Officer.



- IV. Enter the credentials in the login page
 - 1. Enter the email address
 - 2. Enter the password provided during account creation (Enable show password option to view the password as it is being typed)
 - 3. Click the 'Sign in' button

Email address

 1

Password

Show password

 2 3

V. Complete two-factor authentication

1. Enter the security code or OTP based on the second authentication method chosen during the account set up
2. Click the 'Submit' button

Enter your backup security code

You can use this security code once. After you enter it, you'll need to use a new key.

 1
 2

Don't have your backup codes available?
[Choose another authentication method](#)

VI. Click the 'Agree and Continue' button on the next page

✔ Backup codes configured successfully.



You've created an account with login.gov

We'll share this information with **SBA_test**:

- ✔ **Email address**
ws4444testuser@outlook.com
- ✔ **Updated on**
Not yet verified

SBA_test will only use this information to connect to your account



2.2 Claim Your Business

To apply for small business programs, you need to have an active account in SAM.gov. Your SAM.gov data will be used to determine eligibility. Please make sure your SAM.gov data is current when you submit your Certify application. Changes to SAM.gov may take up to 72 hours to display in beta.Certify.sba.gov.

The System for Award Management (SAM) is a Federal Government owned and operated free website that consolidates the capabilities in the Central Contractor Registration (CCR)/FedReg, the Online Representations and Certifications Applications (ORCA), and the Excluded Parties List System (EPLS).

- I. Enter the following details on the claim business page:
 - a. DUNS Number - The Data Universal Numbering System (DUNS) Number is a unique nine-character identification number provided by the commercial company Dun and Bradstreet.
 - b. TIN/EIN Number - A Taxpayer Identification Number (TIN) is an identification number used by the Internal Revenue Service (IRS) in the administration of tax laws. It is issued either by the IRS or the Social Security Administration (SSA). Choices provided for the TIN type include Employer Identification Number "EIN" or Social Security Number "SSN."

- c. MPIN Number - The Marketing Partner Identification Number (MPIN) is a self-created password from SAM.gov.

DUNS Number *

(9 DIGIT NUMBER no spaces or dashes)

TIN/EIN Number *

(9 DIGIT NUMBER no spaces or dashes)

MPIN *

(4-12 CHARACTERS)



- II. Once details are entered, click the 'Find' button
- III. The portal displays the Business details related to the entered DUNS Number
SBA will only accept submissions and digital signatures from qualifying business owners. If you are NOT the business owner, please do not proceed. In order to protect personal financial information entered into the system, only the qualifying business owner will have access to their business records.
- IV. Verify the details and click the 'Claim' button. Once completed, the business is claimed successfully

2.3 SBA Basic Eligibility

2.3.1 Size Standard Compliance

After claiming your business, the application verifies whether your company meets the small business size standard compliance by verifying your NAICS code and collecting your company's associated employee and revenue details.

The North American Industry Classification System (NAICS) is the standard used by Federal statistical agencies in classifying business establishments to collect, analyze, and publish statistical data related to the US business economy.

On claiming your business, the application displays the NAICS code associated with your business for confirmation.

SBA Eligibility - Size

Confirm this is your primary NAICS code: [redacted] *

- Yes
- No

Next

If the displayed NAICS code is not your primary NAICS code, then Update the Firm’s primary NAICS code in SAM.gov before continuing with the program application.

If the displayed NAICS code is your primary NAICS code, select ‘Yes’ and proceed ‘Next.’

After confirmation of your NAICS, you need to provide your Firm's size details such as the ‘number of employees’/ ‘Annual revenue’ for the number of years your Firm has been in business. On providing the details, the application runs the standards check and confirms if your considered small in accordance with size standards and eligible for Government contracting.

SBA Eligibility - Size

Confirm this is your primary NAICS code: [redacted] *

- Yes
- No

[redacted] Small Business Size Standards
750 employees

Select the number of years you are reporting to support your assertion of firm size. *

0 - 1

Complete the table below to determine if the firm is considered small in accordance with its primary North American Industry Classification System (NAICS) code. *

| Year-End | 2018 | 2017 | 2016 | 2015 | 2014 |
|-----------------------------|------|------|------|------|------|
| Number Of Employees | 500 | | | | |
| Average Number Of Employees | 500 | | | | |

📌 Eligible for Government Contracting
Based on the information you provided, the firm is considered small in accordance with its primary North American Industry Classification System (NAICS) code.

Next

If your Firm is not eligible for Government Contracting, then you shall not be able to proceed further with your application.

2.3.2 Business Type Eligibility Check

The applicant firm must be a for-profit business into quality for SBA small business program and should confirm your primary business type as per SBA data.

SBA Eligibility - Business Type

Is the applicant firm a for-profit business? *

- Yes
- No

Confirm this is the applicant firm's Primary Business Type: Partnership or Limited Liability Partnership *

- Yes
- No

Next

If you have any disagreement with your primary business type data pulled from SAM, you must update your business type in SAM before proceeding further.

2.3.3 SBA Eligibility - Debarment

The application allows submission of the application for SBA small business program only if the Firm or any of its owners not have an active exclusion in the System for Award Management. If an applicant or one of its principals is on the General Services Administration (GSA) list of debarred and suspended bidders, the Firm is ineligible for the WOSB program

SBA Eligibility - Debarment

Does the firm or any of its owners have an active exclusion in the System for Award Management? *

- Yes
- No

Next

2.3.4 SBA Eligibility - Citizenship

To qualify for the SBA Small Business Programs, the applicant must be a US Citizen.

The applicant must provide proof of US Citizenship documents. The following qualify as proof of citizenship documents:

- Birth Certificate
- Certificate of Naturalization
- Unexpired US Passport
- Consular Report of Birth Abroad of a US Citizen (Form FS-240).

SBA Eligibility - Citizenship

Is the applicant firm at least 51% owned and controlled by U.S. citizens? *

Yes
 No

! Citizenship
 Please provide Proof of U.S. Citizenship documents. The following qualify as proof of citizenship documents: Birth Certificate, Certificate of Naturalization, Unexpired U.S. Passport or Consular Report of Birth Abroad of a U.S Citizen(Form FS-240).
Note: All owners will be required to submit proof of U.S. citizenship in later screens.

[Proof of U.S. Citizenship](#) [Use Existing Document](#)

Completing the SBA Basic Eligibility checks, the user will be redirected to the Dashboard. The Dashboard contains an SBA Basic Eligibility section where the user can see the responses of all the eligibility questions. To change the answers, click the 'Edit Response' link.

SBA Basic Eligibility

| | |
|---|--------------------------------|
| Size | |
| Confirm this is your primary NAICS code: <input type="text" value="811110"/> | Response: Yes |
| Eligible for Government Contracting? | Response: Yes |
| Business Type | |
| Is the applicant firm a for-profit business? | Response: Yes |
| Confirm this is your Primary Business Type? <input type="text" value="Partnership or Limited Liability Partnership"/> | Response: Yes |
| Citizenship | |
| Is the applicant firm at least 51% owned and controlled by U.S. citizens? | Response: Yes |
| | Edit Responses |

If the user signs out from the portal without completing the SBA Basic Eligibility questions, the system shows the Dashboard page on the next login.

Under the SBA Basic Eligibility section, the portal shows a warning message regarding the incomplete status of the eligibility questions with the link to complete the responses.

The warning message appears until the user completes the eligibility questions.

+

+

SBA Eligibility - Incomplete

There are unanswered SBA Eligibility questions that need to be completed before an application can be created. [Please click here](#) to complete the SBA Eligibility.

2.4 Delegates

A delegate is a person enabled by the applicant to input responses and documents on the applicant's behalf. However, the applicant is directly responsible and must complete the application's attestation questions and electronically sign the application before submission.

The applicant can add a delegate in two ways.

Once the user creates the WOSB application, the portal displays the question/option to add a delegate OR the applicant can add the delegate in the application overview page.

- I. Click the 'New application' link in Dashboard
- II. Select 'Yes' for the question 'Are you assigning delegate for this application?'
- III. Click the 'Assign Delegate' button
- IV. Fill in delegates First Name, Last Name, and email
- V. Click the 'Send Invitation to Collaborate' button
- VI. Delegate receives an email and creates an account by following the steps of Account creation.
- VII. By clicking the icon , the user can update delegates info, enable/disable the delegate, and can send reminders to the delegates.
- VIII. Click the 'Next' button to complete the process.

Assign Delegates

| Delegate Name | Delegate Last Name | Email | Status | Actions |
|---------------|--------------------|--------------------|--------|--|
| Ann | Susan | ann.susan@usda.gov | Active |  <div style="border: 1px solid #ccc; padding: 5px; margin-top: 5px; width: fit-content;"> Edit Reminder Disable Delegate </div> |

Next

In the Application Overview page, the user can view the tab 'Delegates.' It shows the details about delegates.

The user can assign the delegates by filling the details using the same steps given above.

WOSB Initial Application - CAS-01404-Q0N3H9
Owner: JOHN FLOOD (5082472268)

Overview **Delegates** Messages Documents

Delegates

Are you assigning delegate for this application? *

Yes
 No

Add New Delegate

Delegate First Name *

Delegate Last Name *

Email *

[Send Invitation to Collaborate](#)

The invited delegates receive an email for notification of collaboration. He/She shall log into the Certify application and fill the application on the applicant's behalf. However, the applicant is directly responsible and must complete the application's attestation questions and electronically sign the application before submission.

2.5 WOSB Eligibility

In order to be eligible for applying for Small Business Programs, the Women-owned small business must meet the following eligibility criteria.

- At least 51% owned and controlled by one or more women who are US citizens
- Ownership must be direct and not subject to conditions
- A woman or women must manage the day to day operations and provide verifying documents

2.6 WOSB Document Uploads

This section details the applicant's required documents.

A firm must be at least 51% owned and controlled by women who are US citizens and must provide a supporting document for proof of US citizenship to be eligible for the WOSB Program. All the owners will be required to submit proof of US citizenship. The following qualify as proof of citizenship documents:

- I. Birth Certificate
- II. Certificate of Naturalization
- III. Unexpired US Passport
- IV. Consular Report of Birth Abroad of a US Citizen (Form FS-240).

If the applicant(s) is subject to any conditions, executory agreements, voting trust or other arrangements that cause or potentially cause ownership benefits to go to another person, the applicant should provide the following documents.

- I. Copy of the joint venture agreement, if applicable
- II. Copy of the written agreement (an executory agreement, voting trust, or other arrangements), if applicable

The qualifying women must own 51 percent of the firm directly. The 51 percent ownership may not be through another business entity or a trust (including employee stock ownership plan) that is, in turn, owned and controlled by one or more women or economically disadvantaged women. However, ownership by a trust, such as a living trust, may be treated as the functional equivalent of ownership by a woman or economically disadvantaged woman where the trust is revocable, and the woman is the grantor, the trustee, and the sole current beneficiary of the trust. If the ownership is not direct and/or 51% ownership held by the trust with the conditions above, the applicant should provide the following documents

- I. Direct Ownership document, if applicable
- II. Trust Document, if applicable

Based on the business type, the applicant must provide documents to show the 51% ownership in the firm as detailed below.

In the case of a firm that is a partnership, at least 51 percent of each class of partnership interest must be unconditionally owned by one or more women or in the case of an EDWOSB, economically disadvantaged women. For purposes of this requirement, general and limited partnership interests are considered different classes of partnership interest. Applicant should provide the following, to show the partnership interest

- I. The partnership agreement and any amendments, if applicable
- II. The partnership agreement (General and limited partnership), if applicable
- III. An assumed fictitious name document (Doing Business As or DBA), if applicable

In the case of a firm that is a corporation (Corporation & S-Corp) at least 51 percent of each class of voting stock outstanding and 51 percent of the aggregate of all stock outstanding must be unconditionally owned by one or more women, or in the case of an EDWOSB. In determining unconditional ownership of the firm, any unexercised stock options or similar agreements held by a woman will be disregarded. However, any unexercised stock option or other agreement, including the right to convert non-voting stock or debentures into voting stock, held by any other individual or entity will be treated as having been exercised. The corporation shall provide the following documents to support the program application

-
- I. The articles of incorporation, by-laws, and any amendments, if applicable
 - II. The corporation's stock ledger and all stock certificates, including the front and back copies, signed per the by-laws (this also applies to all canceled stock certificates), if applicable
 - III. AN assumed fictitious name document (Doing Business As or DBA), if applicable

In the case of a firm that is a limited liability company, at least 51 percent of each class of member interest must be unconditionally owned by one or more women or in the case of an EDWOSB. The applicant shall provide the following to support the program application,

- I. Articles of Organization (also referred to as Certificate of Organization, or Articles of Formation) and any amendments, If applicable
- II. Operating Agreement and any amendments that show that one or more women serve as management members, with control over all decisions, if applicable
- III. The Joint Venture Agreement if applicable
- IV. An assumed fictitious name document (Doing Business As or DBA), if applicable

In the case of a firm that is Sole Proprietorship, shall provide the following

- I. An assumed fictitious name document (Doing Business As or DBA), if applicable

2.7 Women Ownership

The application shall allow the Firm to submit WOSB / EDWOSB program application based on their eligibility.

To continue with the WOSB application, decide whether to proceed as a WOSB Firm or an EDWOSB Firm,

- I. Navigate to the Application Overview page,
- II. Click the 'Ownership' link
- III. The portal displays declaration statements. Read and click the 'Accept' button

WOSB Application Program Certification

All small businesses that are interested in submitting an offer on a solicitation that has been set aside for WOSBs or EDWOSBs under the WOSB Federal Contract Program must complete this application prior to submitting the offer. To apply for the program, an authorized officer of the firm must upload all required supporting documentation and attest to meeting all WOSB Federal Contract Program eligibility requirements. Once an application and all required supporting documentation are submitted, SBA will review and determine if the firm meets the eligibility requirements to be certified as a participant of the WOSB Federal Contract Program. For inquiries, please e-mail wosb@sba.gov.



Please read carefully the following application statements. The Federal government relies on the information in this form and any documents or supplemental information submitted to determine whether the business is eligible for a contract authorized under the WOSB Federal Contract Program. The definitions for the terms used in this certification are set forth in the Small Business Act, U.S. Small Business Administration (SBA) regulations (13 C.F.R. Part 127), and also any statutory and regulatory provision referenced in those authorities. In addition, please note that the SBA may request further clarification or supporting documentation in order to assist in the verification of any of the information provided and that each person signing this application may be prosecuted if they have provided false information. Any action taken with respect to this application does not affect the Government's right to pursue criminal, civil, or administrative remedies for incorrect or incomplete information given, even if correct information has been included in other materials submitted to SBA.

Accept

IV. The portal displays the questionnaire related to 'Women Ownership' The question, 'Are you 51% owned and controlled by one or more economically disadvantaged women?' appears.

- Choose 'Yes' to proceed as an EDWOSB application. Alternatively, choose 'No' to continue with the WOSB application.

Is the applicant firm 51% owned and controlled by one or more women? *

- Yes
- No

Warning

The following question will allow the applicant firm to proceed with an Economically Disadvantaged WOSB (EDWOSB) application. To apply as an EDWOSB, a firm must show that it is 51% owned and controlled by one or more economically disadvantaged women.

Is the applicant firm 51% owned and controlled by one or more economically disadvantaged women? *

- Yes
- No

2.8 Firm Ownership

- I. Confirm If the applicant(s) is not subject to any conditions, executory agreements, voting trust or other arrangements that cause, or potentially cause ownership benefits to go to another person.

« Application Overview

SBA Basic Eligibility

Basic Eligibility ✓

Ownership

Women Ownership ✓

> Firm Ownership

Business Structure

Summary

Existing Qualified Certification

8(a) Certification

Third-Party

CVE

Summary

Firm Ownership - Ownership Benefits

Is the following statement true? The applicant(s) is not subject to any conditions, executory agreements, voting trust or other arrangements that cause or potentially cause ownership benefits to go to another person. *

Yes

No

More Information

If No, provide a written explanation within the comment box and upload a copy of the **written agreement (executory agreement, voting trust, or other arrangements)** with conditions.

- II. Check whether the applicant has Direct ownership or not, If the Firm is owned by another business entity, provide a written explanation within the comment box, and upload the supporting documentation for the other business entity.

SBA Basic Eligibility

Basic Eligibility ✓

Ownership

Women Ownership ✓

> Firm Ownership

Firm Ownership - Direct Ownership

Does the applicant have direct ownership? *

Yes

No

- III. Verify and submit, if the 51% ownership held by trust and trust is revocable, and the applicant is the grantor, the trustee, and the sole current beneficiary of the trust

Firm Ownership - Trust

Is the 51% ownership held by a trust? *

- Yes
 No

Is the trust revocable and does it designate the applicant(s) as the grantor, the trustee, and the sole beneficiary? *

- Yes
 No
 N/A

! More Information

If No, provide a written explanation within the comment box and upload the **Trust Document**.

If the ownership is not held through a trust, select N/A.

SBA will treat ownership by a trust, such a living trust, as the functional equivalent of ownership by the applicant where the trust is revocable, and the applicant is the grantor, the trustee, and the sole current beneficiary of the trust . Reference: [13 C.F.R. 127.201\(c\)](#).

Note:

- I. The applicant(s) should not subject to any conditions, executory agreements, voting trust or other arrangements that cause or potentially cause ownership benefits to go to another person
- II. The 51% ownership must be direct and not through another business entity or a trust (including employee stock ownership plan
- III. Companies that attain 51% ownership by an applicant(s) through a trust or other arrangement that is owned and controlled by women are generally not eligible for the program.
- IV. SBA will treat ownership by a trust, such a living trust, as the functional equivalent of ownership by the applicant where the trust is revocable, and the applicant is the grantor, the trustee, and the sole current beneficiary of the trust

2.9 Business Structure

The applicant should tenure the below for their particular business type, including that the applicant firm 51% owned and controlled by one or more women.

Partnership

- I. The partnership agreement must show that at least 51% of each class of partnership interest is unconditionally and directly owned by the applicant(s)
- II. The partnership agreement must show that the applicant(s) serve as general partners, with control over all partnership decisions

Corporation & S-Corp

- I. The corporation's stock ledger and stock certificates must show that the applicant(s) own at least 51% of all outstanding stock
- II. The corporation's stock ledger and stock certificates must show that at least 51% of each class of voting stock is owned by the applicant

- III. The Articles of Incorporation and By-laws must show that the applicant(s) control the Board of Directors

Limited Liability Company

- I. The Articles of Organization, Operating Agreement, and any amendments must show that at least 51% of each class of member interest is unconditionally and directly owned by the applicant(s)
- II. The Articles of Organization and any amendments or Operating Agreement and any amendments must show that the applicant(s) serve as management members, with control over all decisions of the limited liability company

[« Application Overview](#)

SBA Basic Eligibility

Basic Eligibility 

Ownership

Women Ownership 

Firm Ownership 

> Business Structure

Summary 

Existing Qualified Certification

8(a) Certification 

Third-Party 

Business Structure - Corporation

Do the corporation's stock ledger and stock certificates show that the applicant(s) own at least 51% of all outstanding stock? *

Yes

No

More Information

If Yes, upload the corporation's stock ledger and all stock certificates, including the front and back copies signed in accordance with the by-laws (this also applies to all cancelled stock certificates).

- « Application Overview
- SBA Basic Eligibility
 - Basic Eligibility ✓
- Ownership
 - Women Ownership ✓
 - Firm Ownership ✓
- > Business Structure
 - Summary ✓
- Existing Qualified Certification
 - 8(a) Certification ✓
 - Third-Party
 - CVE
 - Summary ✓
- Individual Contributors
 - Invite & Questionnaire

Partnership - General Partners

Does the partnership agreement show that the applicant(s) serve as general partners, with control over all partnership decisions? *

Yes
 No

More Information
If No, provide a written explanation within the comment box.
If Yes, upload the partnership agreement.

[Partnership Agreement](#) [Use Existing Document](#)

Partnership - Fictitious Name

Does the partnership use a fictitious name (doing business as or DBA)? *

Yes
 No

More Information
An assumed fictitious name document (Doing Business As or DBA) is filed with your applicable Secretary of State office when your firm is conducting business under a name that is not the firm's legal name.
If No, provide a written explanation within the comment box.
If Yes, upload the **Assumed/Fictitious Name Document**.

[Assumed/Fictitious Name](#) [Use Existing Document](#)

Business Structure - Partnership or Limited Liability Partnership

Does the partnership agreement show that at least 51% of each class of partnership interest is unconditionally and directly owned by the applicant(s)? **Response:** Yes
[Change answer](#)

Does the partnership agreement show that the applicant(s) serve as general partners, with control over all partnership decisions? **Response:** Yes
[Change answer](#)

Does the partnership use a fictitious name (doing business as or DBA)? **Response:** Yes
[Change answer](#)

[Submit](#)

2.10 Prior Certifications

The Existing Qualified Certification section provides the ability for the applicants confirm and submit eligible prior certifications to demonstrate the eligibility requirements of the WOSB/EDWOSB application.

- If the applicant firm is currently certified by SBA as an 8(a) Business Development (BD) Program Participant, then the applicant will be able to attach the Annual Review Letter or 8(a) acceptance letter, if they are in their first program year.

« Application Overview

SBA Basic Eligibility

Basic Eligibility ✓

Ownership

Women Ownership ✓

Firm Ownership ✓

Business Structure ✓

Summary ✓

Existing Qualified Certification

> **8(a) Certification**

Third-Party

CVE

Summary

8(a) Certification

Is the applicant firm currently certified by the U.S. Small Business Administration as an 8(a) Business Development (BD) Program Participant? *

- Yes
- No

! More Information

If the applicant is not currently an 8(a) BD Program Participant, please select "No". If the applicant is a current 8(a) Participant and at least 51% of the business is owned by one or more women, you are eligible for the WOSB Program as an EDWOSB.

Upload your most recent **Annual Review Letter** or your **8(a) acceptance letter** if your firm has not yet undergone an Annual Review.

- The applicant can upload their certificate received from an SBA approved Third-Party Certifier. (TPC) The applicant can attach the WOSB, EDWOSB, or Both if they already have.

« Application Overview

SBA Basic Eligibility

Basic Eligibility ✓

Ownership

Women Ownership ✓

Firm Ownership ✓

Business Structure ✓

Summary ✓

Existing Qualified Certification

8(a) Certification

> **Third-Party**

CVE

Summary

Third-Party

Is the applicant certified as WOSB, EDWOSB or Both? *

- Yes
- No

Select which type of certificate *

- WOSB
- EDWOSB
- Both

! More Information

You may self-certify for the WOSB Program through this website or you may elect to use the services of a Third-Party Certifier to demonstrate eligibility. There is no requirement to use a Third-Party Certifier. However, if you have worked with an SBA-approved Third-Party Certifier to review your business information, upload the current **Third-Party Certifier Certificate**.

The only SBA-approved Third-Party Certifiers are:

- El Paso Hispanic Chamber of Commerce (WOSB and EDWOSB)
- National Women Business Owners Corporation (WOSB and EDWOSB)
- US Women's Chamber of Commerce (WOSB and EDWOSB)
- Women's Business Enterprise National Council (WBENC) (WOSB only)

Reference: [Small Business Act](#), 15 U.S. Code Chapter 14, 637, Section 8m

Since receiving an SBA-approved Third-Party Certification, have there been any changes in circumstances affecting the applicant(s) eligibility? *

- Yes
- No

Explain why you made this choice. *

- The applicants will be able to attach their certification letter from the Department of Veterans Affairs Center for Verification and Evaluation (CVE).

« Application Overview

SBA Basic Eligibility

Basic Eligibility ✓

Ownership

Women Ownership ✓

Firm Ownership ✓

Business Structure ✓

Summary ✓

Existing Qualified Certification

8(a) Certification

Third-Party ✓

> CVE

Summary

CVE

Is the applicant(s) certified as a VOSB/SDVOSB by the Department of Veteran Affairs' Center for Verification and Eligibility? *

- Yes
- No

! More Information

If the applicant is currently a certified VOSB/SDVOSB by the Department of Veteran Affairs Center for Verification and Eligibility (CVE) and at least 51% of the business is owned and controlled by one or more women, you are eligible for the WOSB Program.

Upload your most recent **CVE certification letter**.

CVE Certification Letter
Use Existing Document

| Type | File Name ↑ | Type of Document | Created On ↓ |
|------|--|------------------|---|
| | | | |

Next

2.11 Certificate Uploads

Existing Qualified Certifications have three sections 8(a) Certification, Third-party, and CVE. The portal allows attaching any one of the certificates.

- ✓ Current 8(a) Program Participants—Upload the most recent annual review letter or an 8(a) acceptance letter if the Firm is in Program Year 1.
- ✓ TPC-Certified—Upload WOSB and/or EDWOSB certificate.
- ✓ CVE—Upload certificate and supporting documentation

1. Complete Ownership questions
2. Navigate to the Application Overview page

3. Click 'Other Certification' link. It directs to 8(a) certification section. The portal displays 'Is the applicant firm currently certified by the U.S. Small Business Administration as an 8(a) Business Development (BD) Program Participant?' question.
 - a. If the user has an 8(a) certification, choose to answer 'Yes' and attach the certifications.
 - b. Click the 'Next' button to move to the Summary page.
 - c. Alternatively, choose to answer 'No' to proceed with Third-party certification.
 - d. Click the 'Next' button. The system should display the Third-party page.

! More Information

If the applicant is not currently an 8(a) BD Program Participant, please select "No". If the applicant is a current 8(a) Participant and at least 51% of the business is owned by one or more women, you are eligible for the WOSB Program as an EDWOSB.

Upload your most recent **Annual Review Letter** or your **8(a) acceptance letter** if your firm has not yet undergone an Annual Review.

Annual Review Letter

8(a) Acceptance Letter

Use Existing Document

The Third-party section displays, 'Is the applicant certified as a WOSB by an SBA approved Third-Party Certifier?' question.

- a. If the user has TPC certification, choose to answer 'Yes', follow the instructions on the portal, and attach the certifications.
- b. Click the 'Next' button to move to the Summary page.

! More Information

You may self-certify for the WOSB Program through this website or you may elect to use the services of a Third-Party Certifier to demonstrate eligibility. There is no requirement to use a Third-Party Certifier. However, if you have worked with an SBA-approved Third-Party Certifier to review your business information, upload the current **Third-Party Certifier Certificate**.

The only SBA-approved Third-Party Certifiers are:

- El Paso Hispanic Chamber of Commerce (WOSB and EDWOSB)
- National Women Business Owners Corporation (WOSB and EDWOSB)
- US Women's Chamber of Commerce (WOSB and EDWOSB)
- Women's Business Enterprise National Council (WBENC) (WOSB only)

Reference: [Small Business Act](#), 15 U.S. Code Chapter 14, 637, Section 8m

WOSB Certificate

EDWOSB Certificate

Use Existing Document

- c. Alternatively, choose to answer 'No' to proceed with CVE certification.
- d. Click the 'Next' button. The system should display the CVE page.

The CVE section displays, 'Is the applicant(s) certified as a VOSB/SDVOSB by the Department of Veteran Affairs' Center for Verification and Eligibility?' question.

- a. If the user has CVE certification, choose to answer ‘Yes’, and attach the certifications.
- b. Click the ‘Next’ move to the Summary page.
- c. Alternatively, choose to answer ‘No’ to proceed without CVE certification.
- d. Click the ‘Next’ button. The system should display the Summary page.

! More Information

If the applicant is currently a certified VOSB/SDVOSB by the Department of Veteran Affairs Center for Verification and Eligibility (CVE) and at least 51% of the business is owned and controlled by one or more women, you are eligible for the WOSB Program.

Upload your most recent **CVE certification letter**.

[CVE Certification Letter](#) [Use Existing Document](#)

2.12 Business Type Ownership Control

This section explains the applicant's control over the business to be eligible for the WOSB program. Including the Ownership, the applicants should possess the following control on the day-to-day management of business operations.

- I. The applicants should be in control of long-term decision making and day-to-day management and administration of business operations

Management

Is the applicant(s) in control of long-term decision making and day-to-day management and administration of business operations? *

- Yes
- No

! More Information

Reference : 13 C.F.R. 127.202(a)

- II. The applicant should hold the highest officer position in the business and should have the managerial experience needed to run the business. And Upload a resume to show a Managerial experience.

Highest Position

Does the applicant hold the highest officer position in the business, and does she have the managerial experience needed to run the business? *

- Yes
- No

! More Information

If Yes, please **upload a resume** to show managerial experience. The woman must have managerial experience of the extent and complexity needed to run the business. Reference: 13 C.F.R. 127.202(b)

- III. Also, the applicant should manage the business on a full-time basis and devote full-time attention to the business during the normal working hours of similar businesses

Does the applicant who holds the highest officer position manage the business on a full-time basis and devote full-time attention to the business during the normal working hours of similar businesses? *

- Yes
- No

- IV. The applicant needs to have the technical expertise or possess the required license to control the business OR the ability to demonstrate that the applicant has ultimate managerial and supervisory control over those who possess the required licenses or technical expertise.
- V. The applicant(s) should fully control the business, that is, no one else has actual control or has the power to control the business

Full Control

Does the applicant(s) have the technical expertise or the required licensed for the business? *

- Yes
- No

Does the applicant(s) fully control the business, that is, no one else has actual control or has the power to control the business? *

- Yes
- No

« Application Overview

SBA Basic Eligibility

Basic Eligibility ✓

Ownership

Women Ownership ✓

Firm Ownership ✓

Business Structure ✓

Summary ✓

Existing Qualified Certification

8(a) Certification ✓

Third-Party ✓

CVE ✓

Summary ✓

Control

Management ✓

Highest Position ✓

Full Control ✓

> Summary

Summary - Control

Management

Is the applicant(s) in control of long-term decision making and day-to-day management and administration of business operations? **Response: Yes**
[Change answer](#)

Highest Position

Does the applicant hold the highest officer position in the business, and does she have the managerial experience needed to run the business? **Response: Yes**
[Change answer](#)

Does the applicant who holds the highest officer position manage the business on a full-time basis and devote full-time attention to the business during the normal working hours of similar businesses? **Response: Yes**
[Change answer](#)

Full Control

2.13 EDWOSB Financials

To qualify as an Economically Disadvantaged Business within the women’s contracting program, the applicant’s business must:

- I. Meet all the requirements of the women’s contracting program
- II. Also, the financial records of the applicant(s) should show that the applicant is economically disadvantaged and should Provide the last three (3) W-2s, Schedules, Federal Tax Returns Form 1040, and completed IRS FORM 4506-T for the applicant(s) and their spouses.

If the applicant is a current 8(a) Participant and at least 51% of the business is held by women, The applicant eligible for the WOSB Program as an EDWOSB. If the Applicants deemed ineligible for EDWOSB will automatically be reviewed for WOSB eligibility.

Financial Records

Do the financial records of the applicant(s) show that she is economically disadvantaged? *

- Yes
 No

! More Information

Provide the last three (3) **W-2s, Schedules, Federal Tax Returns Form 1040**, and completed **IRS FORM 4506-T** for the applicant(s) and their spouses.

Upload the required document types by clicking on their respective buttons.

The personal financial condition of the woman claiming economic disadvantage, including her personal net worth, her adjusted gross income for the past three years (including bonuses, and the value of company stock given in lieu of cash), and the fair market value of all of her assets, whether encumbered or not, will be considered in determining whether she is economically disadvantaged.

[W-2](#) [Schedule](#) [IRS Form 1040](#) [IRS Form 4506-T](#) [Use Existing Document](#)

- III. Be owned and controlled by one or more women, each with a personal net worth less than \$750,000

Net Worth

Can the applicant(s) show that her personal net worth (assets – liabilities) is less than \$750,000, excluding her ownership interest in the business and her equity interest in her primary personal residence? *

- Yes
 No

- IV. Be owned and controlled by one or more women, each with \$350,000 or less in adjusted gross income averaged over the previous three years

Adjusted Gross Income

Is the applicant(s) adjusted gross income averaged over the previous three years at or less than \$350,000? *

- Yes
 No

Does the adjusted gross income of the applicant(s) averaged over the three years preceding the certification exceed \$350,000; however, the woman can show that (1) this income level was unusual and not likely to occur in the future; (2) that losses commensurate with and directly related to the earnings were suffered; or (3) that the income is not indicative of lack of economic disadvantage? *

- Yes
- No
- N/A

More Information

If this situation does not apply, select N/A.

V. Be owned and controlled by one or more women, each \$6 million or less in personal assets

Assets

Is the fair market value of all the assets of the applicant(s) at or less than \$6 million? *

- Yes
- No

More Information

Assets include her primary residence and the value of the business.

Can the applicant(s) confirm that no assets were transferred within two years of the date of EDWOSB certification? *

- Yes
- No

Note:

- A. The transfer of assets within the two-years will not be attributed to the woman if the transfer was:
 - To or on behalf of an immediate family member for that individual's education, medical expenses, or some other form of essential support; or
 - To an immediate family member in recognition of a special occasion, such as birthday, graduation, anniversary, or retirement.
- B. The funds invested in an official retirement account will be excluded from the assessment of an economically disadvantaged individual's net worth
- C. SBA may consider a spouse's financial situation in determining a woman's access to credit and capital. When married, an individual claiming economic disadvantage must submit separate financial information for her spouse, unless the individual and the spouse are legally separated. SBA will consider a spouse's financial situation in determining an individual's access to credit

and capital where the spouse has a role in the business (e.g., an officer, employee or director) or has lent money to, provided credit or financial support to, or guaranteed a loan of the business. SBA may also consider the spouse's financial condition if the spouse's business is in the same or similar line of business as the EDWOSB or WOSB and the spouse's business and WOSB share similar names, Web sites, equipment or employees.

« Application Overview

SBA Basic Eligibility

Basic Eligibility ✓

Ownership

Women Ownership ✓

Firm Ownership ✓

Business Structure ✓

Summary ✓

Existing Qualified Certification

8(a) Certification

Third-Party ✓

CVE ✓

Summary ✓

Control

Management ✓

Highest Position ✓

Full Control ✓

Summary ✓

Economic Disadvantage

Financial Records ✓

Net Worth ✓

Adjusted Gross Income ✓

Assets ✓

> Summary

Individual Contributors

Invite & Questionnaire

Invitee

Summary - Economic Disadvantage

Economic Disadvantage

Do the financial records of the applicant(s) show that she is economically disadvantaged? **Response:** Yes

Net Worth

Can the applicant(s) show that her personal net worth (assets – liabilities) is less than \$750,000, excluding her ownership interest in the business and her equity interest in her primary personal residence? **Response:** Yes

Adjusted Gross Income

Is the applicant(s) adjusted gross income averaged over the previous three years at or less than \$350,000? **Response:** Yes

Does the adjusted gross income of the applicant(s) averaged over the three years preceding the certification exceed \$350,000; however, the woman can show that (1) this income level was unusual and not likely to occur in the future; (2) that losses commensurate with and directly related to the earnings were suffered; or (3) that the income is not indicative of lack of economic disadvantage? **Response:** N/A

Assets

Can the applicant(s) confirm that no assets were transferred within two years of the date of EDWOSB certification? **Response:** Yes

Is the fair market value of all the assets of the applicant(s) at or less than \$6 million? **Response:** Yes

If the applicant(s) transferred assets within two years of the date of the certification, can she confirm that the assets were transferred: (1) to or on behalf of an immediate family member for that individual's education, medical expenses, or some other form of essential support; or (2) to an immediate family member in recognition of a special occasion, such as a birthday, graduation, anniversary, or retirement? **Response:** N/A

2.14 Document Uploads

You will have to upload documents while answering questions in Certify. You will not be able to upload documents directly to the documents tab or within the messages tab. Documents should be individual PDF files (not zipped) with the proper naming convention. Acceptable characters are letters, numbers, dashes (-), and underscores (_). ex: document title year (ex. W2_2015). Files must be 25MB or less. Do not password protect any files.

Each question has a button with document name/type, if applicable. Use the button for the particular question to upload the document.

For example,

1. Choose to answer 'Yes' for the question 'Is the applicant firm at least 51% owned and controlled by US citizens?'
2. Click the 'Proof of US Citizenship' button. Directs to Upload Document page

Is the applicant firm at least 51% owned and controlled by U.S. citizens? *

Yes 1
 No

! Citizenship
Please provide Proof of U.S. Citizenship documents. The following qualify as proof of citizenship documents: Birth Certificate, Certificate of Naturalization, Unexpired U.S. Passport or Consular Report of Birth Abroad of a U.S. Citizen(Form FS-240).
Note: All owners will be required to submit proof of U.S. citizenship in later screens.

2 [Proof of U.S. Citizenship](#) [Use Existing Document](#)

3. Click the 'Add file' button. It should display a window to Choose a file to upload

Upload Document

3 [Add file](#)

There are no folders or files to display.

4. Choose a file
5. Click the 'Add files' button

Add files

4

Choose files

5 [Add files](#) [Cancel](#)

6. Click the 'Complete upload' button

Upload Document

| Name ↑ | Modified |
|--|------------------------|
|  proof of U.S. citizenship.docx (16 KB) | less than a minute ago |



Each question has a button 'Use Existing Document', if applicable. By using this, the user can attach documents to a specific question from the documents already uploaded

1. Click 'Use Existing Document' button. It should display a window with existing documents list

Is the applicant firm at least 51% owned and controlled by U.S. citizens? *

Yes
 No

! Citizenship
Please provide Proof of U.S. Citizenship documents. The following qualify as proof of citizenship documents: Birth Certificate, Certificate of Naturalization, Unexpired U.S. Passport or Consular Report of Birth Abroad of a U.S Citizen(Form FS-240).
Note: All owners will be required to submit proof of U.S. citizenship in later screens.

Proof of U.S. Citizenship 

2. Select the document to be attached
3. Click 'Add selected' button

Uploaded Documents

| | File Name ↑ | Type of Document | Case | Created On ↓ |
|---|------------------------------------|---------------------------|------|-------------------|
| ✓ | proof of U.S. citizenship_BBC.docx | Proof of U.S. Citizenship | | 5/27/2020 1:14 PM |

Selected Documents

proof of U.S. citizenship_BBC.docx ✖

To view all documents uploaded in Certify, regardless of program/application, click the “Documents” link in the navigation bar at the top of the page to access your complete Document Library.

Dashboard
Business
Documents
Profile
Help
Sign out

All Documents

Total Documents: 11

| Type | File Name ↑ | Type of Document | Uploaded By | Created On ↓ |
|------|----------------------|---------------------------|-------------|--------------------|
| | Tax Return.docx | Tax Returns | Alwina Joan | 6/14/2020 2:36 PM |
| | Resume.docx | Resume | Alwina Joan | 6/14/2020 1:04 PM |
| | US citizenship.docx | Proof of U.S. Citizenship | Alwina Joan | 6/14/2020 1:03 PM |
| | IRS Form 4506-T.docx | IRS Form 4506-T | Alwina Joan | 6/14/2020 12:52 PM |
| | IRS Form 1040.docx | IRS Form 1040 | Alwina Joan | 6/14/2020 12:51 PM |
| | Schedule.docx | Schedule | Alwina Joan | 6/14/2020 12:51 PM |
| | W2.docx | W-2 | Alwina Joan | 6/14/2020 12:50 PM |
| | Resume.docx | Highest Position Resume | Alwina Joan | 6/14/2020 12:49 PM |

2.15 Individual Contributor

Everyone contributing to your Firm must provide their contribution details before you can submit your Firm’s application.

- I. Each individual whose ownership interest will be used to qualify for WOSB or EDWOSB must complete an application. For example, if a Firm has three owners with ownership distributions of 34%-woman, 33%-woman, 33%-man, each woman in this example must complete an application. This is required to qualify for WOSB or EDWOSB status and demonstrate that the Firm is 51% owned by one or more women.

- II. If an individual is claiming economic disadvantage and is currently married or legally separated, every Firm owner claiming economic disadvantage must have their spouse fill out financial information so SBA can assess the economic disadvantage.
- III. Each individual participating on the board of the WOSB/EDWOSB Firm must complete an application.

Each Individual Contributor must provide the following information:

2.15.1 General information

General Information of the Individual Contributor

- Sex

Sex

I am: *

- Female
- Male

Next

- Marital status

Marital Status

Marital Status *

- Unmarried
- Married
- Legally Separated

Next

- Social security number

Social Security Number

Social Security Number *

Next

- Date of birth

Date of Birth

Date of Birth *

Next

○ US citizenship

The applicant must provide proof of US Citizenship documents. The following qualify as proof of citizenship documents:

- Birth Certificate
- Certificate of Naturalization
- Unexpired US Passport
- Consular Report of Birth Abroad of a US Citizen (Form FS-240).

US Citizenship

Are you a U.S Citizen? *

- Yes
 No



More Information!

Attachment of supporting documents is required.

Proof of U.S. Citizenship

Use Existing Document

○ Contact information

Contact Information

Best Contact Phone Number *

Next

○ Address

Current Home Address

Provide Your Current Home Address

Street Address *

City *

State *

Zip *

Country *

Date of Residency of Current Home Address *

2.15.2 Resume

Provide a personal resume with the following:

- Education
- Technical training
- Description of your current duties within the Applicant firm
- Any other current or past employment experience including:
 - Employer's name
 - Dates of employment
 - Job title
 - Description of duties
- Be sure to include any outside businesses you own

Upload Resume

Upload your personal resume.

| Document URL | File Name  | Type of Document | Uploaded By | Created On  |
|---|---|------------------|-------------|--|
|  | Resume.docx | Resume | Alwina Joan | 6/14/2020 1:04 PM |

2.15.3 Ownership and Control

2.15.3.1 Firm Ownership

Impart the specified percentage of the Applicant Firm you own, and List all positions you hold in the Applicant Firm.

Applicant Firm Ownership

What percentage of the Applicant Firm do you own? *

List all positions you hold in the Applicant Firm. *

Next

2.15.3.2 Bank account access

Limitations on Firm's Bank Account - Describe any limitations on the firm's bank account, including required on specific dollar amounts.

Bank Account Access

Are you authorized to access or make withdrawals from the Applicant's Firm bank account? *

Yes

No

Next

2.15.3.3 Full time devotion

If you have a job outside the applicant firm, then Upload a document with information about the job title, your primary role and responsibilities, average number of hours worked per week, normal weekly work schedule.

Provide an explanation of how this job does not conflict with the day-to-day management of the Firm.

Full Time Devotion

Do you have another job outside the Applicant Firm? *

- Yes
- No

More Information!

If Yes, upload a **document with information about the job:**

- Job title
- Your primary role and responsibilities
- Average number of hours worked per week
- Normal weekly work schedule

Explanation of how this job does not conflict with the day-to-day management of the firm.

Full Time Devotion Document

Use Existing Document

2.15.3.4 Business affiliations

Provide details on business affiliation with another Firm.

If you own or work for any other firm that has a relationship with the Applicant Firm, then upload a detailed explanation of the firm and relationship including Firm name, Firm NAICS code, Your ownership or interest, Your title, Your primary role or function, Nature of the relationship with the Applicant Firm, Financial Details (loan agreements, other agreements), Business Revenues and Any additional relevant information

Ownership in other firms does not include any publicly traded stocks, bonds, or mutual funds.

Business Affiliations

Do you own or work for any other firm that has a relationship with the Applicant Firm? *

- Yes
- No

2.15.4 Prior 8(a) Involvement

Provide details on prior 8(a) involvement/federal employment and upload Letter of No Objection/Letter of No Objection - Household.

Federal Employment

Are you a Federal Government employee holding a position of GS-13 or above? *

- Yes
 No

More information!

If Yes, you must submit a **letter of no objection** from your federal agency. The Federal Acquisition Regulation (FAR), Subpart 3.6 places restrictions on Federal Government employees which may prevent the Applicant Firm from acquiring contracts or create conflicts of interest. In addition, there are limitations on SBA's ability to provide assistance to government employees. See 13 C.F.R. § 105.301.

Household Federal Employment

Is any member of your household a Federal Government employee holding a position of GS-13 or above? *

- Yes
 No

More Information!

If Yes, provide a **letter of no objection** from the federal agency employing the family member. Reference: 13 C.F.R. § 105.301

2.15.5 Financial data

2.15.5.1 Cash on hand

Provide details on Cash on hand for assessing if the applicant is eligible for EDWOSB.

Provide the date of the information provided (i.e. the last date of the previous month). The information must be no older than 30 days. Provide the sum of all currency that are not on deposit with a financial institution. Include funds held in certificates of deposit and money market accounts as part of the Savings Account(s) Balance. Include funds held in certificates of deposit and money market accounts as part of the Checking Account(s) Balance.

Cash on Hand

As of Date *

! More Information!

Use the date of the information provided (i.e. the last date of the previous month). The information must be no older than 30 days.

Cash on Hand *

! More Information!

The sum of all currency that are not on deposit with a financial institution.

2.15.5.2 Other sources of Income

Provide yearly salary from applicant firm or other salaried positions. Include income from any other sources not identified elsewhere (for example, a pension or disability income). Do not include investment or real estate income, which are detailed in another section. Provide the value of the individual's equity interest in the applicant firm. Provide the value of the individual's equity interest in companies other than the applicant firm.

Other Sources of Income

Salary *

! More Information!

Include yearly salary from applicant firm or other salaried positions.

Other Income

2.15.5.3 Notes receivable

Provide the details of notes receivable from others.

Note receivable is a written promise to receive money at a future date. The money is usually made up of interest and principal. This should make sure to include all notes receivables that the individual has with the applicant firm and all other firms that they may own

Notes Receivable

Do you have any notes receivable from others? *

- Yes
 No

! More Information!

Note receivable is a written promise to receive money at a future date. The money is usually made up of interest and principal. This should make sure to include all notes receivables that the individual has with the applicant firm and all other firms that they may own.

Notes Receivable

Name of Debtor *

Address of Debtor *

Original Balance *

Current Balance *

Payment Amount (Calculated Annually) *

2.15.5.4 Retirement Accounts

If you have any retirement accounts Include an account statement issued within 30 days of application submission and upload the account statement document.

Retirement Accounts

Do you have any retirement accounts? *

- Yes
 No

! Account Statement

Include an account statement issued within 30 days of application submission. SBA will not include the funds invested in an Individual Retirement Account (IRA) or other official retirement account in calculating your personal net worth.

Account Statement Document

Use Existing Document

Retirement Accounts

Type *

Total Value *

Contributions Thus Far *

Date of Initial Contribution *

2.15.5.5 Life Insurance

Provide the details of Life Insurance if you have a life insurance policy that has a cash surrender value and also provide the details if you have a loan against a life insurance policy.

Life Insurance

Do you have a life insurance policy that has a cash surrender value? *

- Yes
 No

! More Information!

The cash surrender value is the cash value that is available to a life insurance policyholder upon early termination of the policy. This does not apply to the term life insurance policies. Term life insurance provides coverage for a certain time period and does not accumulate a cash value. For permanent or whole life insurance policies, the cash surrender value is the cash value of the accumulated investment portion of the policy payable to the policyholder upon cancellation of the policy.

Life Insurance

Name of Insurance Company *

Cash Surrender Value (If Applicable) *

Face Amount *

Beneficiaries *

Do you have any loans against a life insurance policy? *

- Yes
 No

What is the current balance of any loans against life insurance? *

2.15.5.6 Stocks and Bonds

Provide the details of Stocks and Bond if you have any stock, bonds, or mutual funds.

Stocks and Bonds

Do you have any stocks, bonds or mutual funds? *

- Yes
 No

i Total Value

Total value equals the Market Value Quotation multiplied by the number of shares.

Stock and Bonds

Type of Stock and Bonds *

Name of Securities *

Total Value *

Number of Shares *

2.15.5.7 Real Estate-Primary Residence

Provide the Primary Residence Details

Real Estate - Primary Residence

Do you own your primary residence? *

- Yes
 No

Primary Residence

Primary Residence Details

What is the address of your primary residence? *

What is the current value of your primary residence? *

i More Information!

Report the total value of your primary residence, not your proportional share.

Is your primary residence jointly owned? *

- Yes
 No

2.15.5.8 Real Estate-Other

Provide your Other Real Estate Holding if you own any additional real estate.

Real Estate - Other

Do you own any additional real estate? *

- Yes
- No

Other

List your Other Real Estate Holdings:

What type of Other Real Estate do you own? *

What is the address of your Other Real Estate? *

What is the current value of your Other Real Estate? *

! More Information!

Report the total value of your "Other Real Estate", not your proportional share.

2.15.5.9 Personal Property

Provide details on personal property owned, If the vehicle is jointly owned or the loan on the vehicle is a joint debt, include only the individual's share of the vehicle value and loan balance.

Personal Property

Do you own any vehicles? *

- Yes
- No

Vehicle

Current Value *

Loan Balance*

Description of Asset *

Create

2.15.5.10 Other Personal Property

If you own any other personal property or assets, Include all household goods, jewelry, art, boats, antiques, etc. with a value over \$2,500. Include any assets held by a revocable trust for which you are the grantor and beneficiary.

Do you own any other personal property or assets? *

- Yes
 No

Other Personal Property

Current Value *

Loan Balance*

Description of Asset *

Create

2.15.5.11 Notes payable and Other Liability

List any notes payable including credit cards and personal lines of credit. Include loans owed to the applicant firm, other companies, and individuals. Exclude mortgage and vehicle loans, etc.

Notes Payable and Other Liability

Do you have any notes payable or other liabilities? *

Yes

No

Notes Payable and Other Liabilities

Type *

Original Balance*

Current Balance*

Payment Amount *

2.15.5.12 Assessed Taxes

Include only assessed taxes that are unpaid. This includes past due personal Federal, state, county, and city taxes. Do not include estimated taxes or business taxes. If this is a joint debt, include only the individual's share of the debt.

Assessed Taxes

Do you have any Assessed Taxes that were unpaid? *

Yes

No

Next

Assessed Taxes

Whom Payable *

Amount *

When Due *

Property (If Any) a Tax Lien Attaches *

2.15.5.13 Tax Returns

Upload your personal Federal tax returns from the last three years, including all schedules and attachments. Provide all W-2 forms, schedules, forms, statements, and 1099s accompanying the tax returns. And select the number of years your firm has been in Business

Tax Returns

Upload your personal Federal tax returns from the last three years including all schedules and attachments.

More Information!

Provide all **W-2 forms, schedules, forms, statements, and 1099s accompanying the tax returns**. If you file jointly with the individual claiming disadvantage, do not upload duplicate documents. You may still need to upload your **individual W-2**.

Tax Returns

Use Existing Document

Select the Number of Years Your Firm Has Been in Business *

- 0-1
- 2
- 3+

Year End

Most Recent Year

First Year Previous

Second Year Previous

Form: Basic 1040

Enter "Taxable Income" from 1040:

2019 - Form 1040, page 1, Line 11b; 2018, pg 2, line 10; 2017 and prior pg 2, line 43

| | | |
|----------------------|----------------------|----------------------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> |
|----------------------|----------------------|----------------------|

Enter "Total Tax" from 1040:

IRS Form 1040, page 2, line 16

| | | |
|----------------------|----------------------|----------------------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> |
|----------------------|----------------------|----------------------|

Business income or (loss) from Schedule C or C-EZ

2019 - Sch 1, line 3; 2018 Sch 1, line 12; 2017 and prior 1040 - line 12

| | | |
|----------------------|----------------------|----------------------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> |
|----------------------|----------------------|----------------------|

Rental real estate, royalties, partnerships, S-Corps, trusts etc.

2019 - Sch 1, line 5; 2018 Sch 1, line 17; 2017 and prior 1040 - line 17

| | | |
|----------------------|----------------------|----------------------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> |
|----------------------|----------------------|----------------------|

TAXABLE INTEREST

IRS Form 1040, line 2b

| | | |
|----------------------|----------------------|----------------------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> |
|----------------------|----------------------|----------------------|

ORDINARY DIVIDENDS (divided by 2 for MFJ unless it is a large amount in which case ownership documentation must be provided)

IRS Form 1040, line 3b

| | | |
|----------------------|----------------------|----------------------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> |
|----------------------|----------------------|----------------------|

TAX REFUNDS, CREDITS, ETC.

IRS Form 1040, line 22

| | | |
|----------------------|----------------------|----------------------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> |
|----------------------|----------------------|----------------------|

CAPITAL GAIN(LOSS)

IRS Form 1040, line 6

| | | |
|----------------------|----------------------|----------------------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> |
|----------------------|----------------------|----------------------|

2.15.6 Personal Summary

View the personal summary and submit it. You will be redirected to the Individual contributor Invitee list page. Click on 'Next' to proceed if there is no more additional contributor.

Invitee Status

Here is a list of all the Individual Contributors and their status on their forms.

| Contributor | Role | Created On | Status |
|-------------|------------|--------------------|-----------|
| Aaron Finch | Firm Owner | 7/10/2020 11:31 AM | Completed |

[Add additional Individual Contributors](#)

[Next](#)

2.16 Add another Firm Owner

If there is any additional contributor/Firm Owner, follow the below instruction to invite them and make them complete the application by providing their contribution details. The applicant can add another WOSB/EDWOSB Firm Owner.

- I. Navigate to the Application Overview page,
- II. Click the 'Individual Contributors' link
- III. Then navigate to Add another WOSB/EDWOSB Firm owner, if applicable.
- IV. Click the 'Add Other Firm Owner' button, provide the firm owner details, and click 'Send Invitation to Collaborate'.

Add another Firm Owner, if applicable.

[Add another WOSB/EDWOSB firm owner, if applicable](#)

More Information!

To qualify as an EDWOSB one or more economically disadvantaged women must unconditionally and directly own at least 51 percent of the firm. To qualify as a WOSB, one or more women must unconditionally and directly own at least 51 percent of the firm.

Each individual whose ownership interest will be used to qualify for WOSB or EDWOSB must complete this application.

For example, a firm has three owners with ownership distributions of 34% woman, 33% woman, 33% man. To qualify for WOSB or EDWOSB status, and demonstrate that the firm is 51% owned by one or more women, each woman in this example must complete this section.

[Add Other Firm Owners](#)

First Name *

Last Name *

Email *

[Send Invitation to Collaborate](#)

- V. Clicking ‘Send Invitation to Collaborate’ button sends an email invite to the contributor with the link to certify the application. Each invited contributor must create an account and login to the portal following the steps included in Logging in Section of this document (Section 2.1). After login, he/she must provide the necessary details to complete the application.
- VI. If you want to Edit or Send a reminder or Disable another firm owner, click the  button and select the option.

[Add Other Firm Owners](#)

| First Name | Last Name | Email | Permission | |
|------------|-----------|-----------------------------|------------|--|
| Johanna | Sheryl | johanna_sheryly@outlook.com | Active |  <ul style="list-style-type: none"> Edit Reminder Disable Other Firm Owner |

2.17 Add spouse of an EDWOSB

If an individual is claiming economic disadvantage and is currently married or legally separated, every firm owner claiming economic disadvantage must have their spouse fill out financial information so SBA can assess the economic disadvantage. If the economically disadvantaged individual is unmarried, skip this question.

- I. Navigate to the Application Overview page,
- II. Click the ‘Individual Contributors’ link
- III. Then navigate to Add spouse of an EDWOSB
- IV. Click ‘Add Spouse’ button, provide the firm owner details, and click ‘Send Invitation to Collaborate’.

Add the spouse of an EDWOSB

Add a spouse of an EDWOSB

More Information!

If an individual is claiming economic disadvantage and is currently married or legally separated, every firm owner claiming economic disadvantage must have their spouse fill out financial information so SBA can assess the economic disadvantage. If the economically disadvantaged individual is unmarried, skip this question.

Add Spouse

First Name *

Last Name *

Email *

Send Invitation to Collaborate

- V. Clicking 'Send Invitation to Collaborate' button sends an email invite to the spouse with the link to certify application. Invited spouse must create an account and login to the portal following the steps included in Logging in Section of this document (Section 2.1). After login he/she must provide the necessary details to complete the application.
- VI. If you want to Edit or Send a reminder or Disable Spouse, click the  button and select the option.

Add Spouse

| First Name | Last Name | Email | Permissions |
|------------|-----------|---------------------|-------------|
| Elisha | Grace | elisha_gr@gmail.com | Active |

- Edit
- Remind
- Disable Spouse

2.18 Add other Individuals

If there are any individuals serving on the board of the WOSB/EDWOSB, follow the below instruction to invite them and make them complete the application by providing their contribution details. Applicant can add another WOSB/EDWOSB Individual Contributor.

- I. Navigate to the Application Overview page,
- II. Click the 'Individual Contributors' link
- III. Then navigate to Add other WOSB/EDWOSB Individuals, if applicable.

- IV. Click 'Add Board Member' button, provide the firm owner details, and click 'Send Invitation to Collaborate'.

Add other individuals serving on the board of the WOSB/EDWOSB concern.

Add other individuals

More Information!
Each individual participating on the board of the WOSB/EDWOSB firm must complete an application. If the WOSB/EDWOSB firm does not have a board, skip this question.

Add Board Member

Board Members

Information

First Name *

Last Name *

Email *

Send Invitation to Collaborate

- V. Clicking 'Send Invitation to Collaborate' button sends an email invite to the contributor with the link to certify application. Each invited contributor must create an account and login to the portal following the steps included in Logging in Section of this document (Section 2.1). After login he/she must provide the necessary details to complete the application.
- VI. If you want to Edit or Send a reminder or Disable another firm owner, click the  button and select the option.

Add Board Member

| First Name | Last Name | Email | Permission |
|------------|--------------|---------------------------|------------|
| Sam | Board Member | SamBoardMemeber@email.com | Active |

- Edit
- Reminder
- Disable Board Member

2.19 Attestation and Submission

Once all the required information and the documents are submitted, the user must submit the application to SBA by attesting the Program Self-Certification Summary. This can only be done by the applicant.

Follow the instruction below to complete the attestation:

- I. Navigate to the Application Overview page,
- II. Click the 'Individual Contributors' link
- III. Then navigate to Invitee section
- IV. Click the 'Next' button
- V. Read and complete the declaration form by selecting each checkbox
- VI. Click the 'Attest and Submit' button

By attesting the application, you are certifying that you are representing on your own behalf, and on behalf of the woman-owned small business or economically disadvantaged woman-owned small business, that the information provided in this certification, and any document or supplemental information submitted, is true and correct as of the date set forth opposite your signature. Any intentional or negligent misrepresentation of the information contained in this certification may result in criminal, civil or administrative sanctions including, but not limited to: 1) fines of up to \$500,000, and imprisonment of up to 10 years, or both, as set forth in 15 USC. § 645 and 18 USC. § 1001, as well as any other applicable criminal laws; 2) treble damages and civil penalties under the False Claims Act; 3) double damages and civil penalties under the Program Fraud Civil Remedies Act; 4) suspension and/or debarment from all Federal procurement and non-procurement transactions; and 5) program termination.

Attestation - WOSB/EDWOSB
Women-Owned Small Business
Program Self-Certification Summary



CHAPEL RETAIL ASSOCIATES, LLC

DUNS: 1316355

CAGE: 44TJ9

- All required documents verifying eligibility for the Woman-Owned Small Business (WOSB) or Economically Disadvantaged Woman-Owned Small Business (EDWOSB) requirements have been submitted to the WOSB Program Repository, including any supplemental documents if there have been changes since the last representation.

- All the statements and information provided in this form and any documents submitted are true, accurate and complete. If assistance was obtained in completing this form and the supporting documentation, I have personally reviewed the information and it is true and accurate. I understand that these statements are made for the purpose of determining eligibility for a WOSB program contract.

- I understand that the information submitted may be given to Federal, State, and local agencies for determining violations of law and other purposes. The certifications in this document are continuing in nature. Each WOSB or EDWOSB prime contract for which the WOSB and EDWOSB submits an offer/quote or receives an award constitutes a restatement and reaffirmation of these certifications.

- I understand that the woman-owned small business or economically disadvantaged woman-owned small business may not misrepresent its status as a WOSB or EDWOSB to: 1) obtain a contract under the Small Business Act; or 2) obtain any benefit under a provision of Federal law that references the WOSB Program for a definition of program eligibility.

- Warning**
By clicking the Submit Button, you are certifying that you are representing on your own behalf, and on behalf of the woman-owned small business or economically disadvantaged woman-owned small business, that the information provided in this certification, and any document or supplemental information submitted, is true and correct as of the date set forth opposite your signature. Any intentional or negligent misrepresentation of the information contained in this certification may result in criminal, civil or administrative sanctions including, but not limited to: 1) fines of up to \$500,000, and imprisonment of up to 10 years, or both, as set forth in 15 U.S.C. § 645 and 18 U.S.C. § 1001, as well as any other applicable criminal laws; 2) treble damages and civil penalties under the False Claims Act; 3) double damages and civil penalties under the Program Fraud Civil Remedies Act; 4) suspension and/or debarment from all Federal procurement and non-procurement transactions; and 5) program termination.

By submitting this certification I, **Roger Federer**, am an officer or owner of Entity **CHAPEL RETAIL ASSOCIATES, LLC** authorized to represent it and electronically sign this certificate on its behalf

PLEASE NOTE: According to the Paperwork Reduction Act, you are not required to respond to this information collection unless it displays a valid OMB approval number. The estimated burden for completing this form, including reading the instructions and compiling the information is 2 hours. If you have questions or comments concerning this estimate or other aspects of this information collection, please contact the US Small Business Administration, Chief, Administrative Information Branch, Washington, D.C. 20416 and/or SBA Desk Officer, Office of Management and Budget, New Executive Office Building, Room 10202, Washington, D.C. 20503.

Full Name

Roger Federer

Sign Date

6/15/2020

Attest and Submit

Attestation - WOSB/EDWOSB

Women-Owned Small Business

Program Self-Certification Summary



CHAPEL RETAIL ASSOCIATES, LLC

DUNS: 1316355

CAGE: 44TJ9

- All required documents verifying eligibility for the Woman-Owned Small Business (WOSB) or Economically Disadvantaged Woman-Owned Small Business (EDWOSB) requirements have been submitted to the WOSB Program Repository, including any supplemental documents if there have been changes since the last representation.
- All the statements and information provided in this form and any documents submitted are true, accurate and complete. If assistance was obtained in completing this form and the supporting documentation, I have personally reviewed the information and it is true and accurate. I understand that these statements are made for the purpose of determining eligibility for a WOSB program contract.
- I understand that the information submitted may be given to Federal, State, and local agencies for determining violations of law and other purposes. The certifications in this document are continuing in nature. Each WOSB or EDWOSB prime contract for which the WOSB and EDWOSB submits an offer/quote or receives an award constitutes a restatement and reaffirmation of these certifications.
- I understand that the woman-owned small business or economically disadvantaged woman-owned small business may not misrepresent its status as a WOSB or EDWOSB to: 1) obtain a contract under the Small Business Act; or 2) obtain any benefit under a provision of Federal law that references the WOSB Program for a definition of program eligibility.
- Warning**
By clicking the Submit Button, you are certifying that you are representing on your own behalf, and on behalf of the woman-owned small business or economically disadvantaged woman-owned small business, that the information provided in this certification, and any document or supplemental information submitted, is true and correct as of the date set forth opposite your signature. Any intentional or negligent misrepresentation of the information contained in this certification may result in criminal, civil or administrative sanctions including, but not limited to: 1) fines of up to \$500,000, and imprisonment of up to 10 years, or both, as set forth in 15 U.S.C. § 645 and 18 U.S.C. § 1001, as well as any other applicable criminal laws; 2) treble damages and civil penalties under the False Claims Act; 3) double damages and civil penalties under the Program Fraud Civil Remedies Act; 4) suspension and/or debarment from all Federal procurement and non-procurement transactions; and 5) program termination.

By submitting this certification I, **Rojer Federer**, am an officer or owner of Entity **CHAPEL RETAIL ASSOCIATES, LLC** authorized to represent it and electronically sign this certificate on its behalf

PLEASE NOTE: According to the Paperwork Reduction Act, you are not required to respond to this information collection unless it displays a valid OMB approval number. The estimated burden for completing this form, including reading the instructions and compiling the information is 2 hours. If you have questions or comments concerning this estimate or other aspects of this information collection, please contact the US Small Business Administration, Chief, Administrative Information Branch, Washington, D.C. 20416 and/or SBA Desk Officer, Office of Management and Budget, New Executive Office Building, Room 10202, Washington, D.C. 20503.

Full Name

Rojer Federer

Sign Date

6/15/2020

Attest and Submit

After hitting the 'Attest and Submit' button, navigate back to the application dashboard page. You can see the Program Participation Status has changed to 'Submitted.'

Women-Owned Small Business (WOSB)

NOTE: Economically-Disadvantaged Women-Owned Small Business (EDWOSB) applicants need to complete a WOSB application.

| Activity | Type | Activity Status | Submission Date | Decision | Expiration Date |
|--------------------------|------|-----------------|-----------------|----------|-----------------|
| WOSB Initial Application | WOSB | Submitted | 7/10/2020 | | |

2.20 Messages

From this section, the applicant can communicate with the SBA agents.

- I. In the Message section, you can view the messages you sent and view the messages you received from the SBA Agent.
- II. The applicant can send a message to SBA Agent by hitting the 'Message SBA Agent' button.
- III. The create message box opens and you can write your message and click send message.

Messages

Message SBA Agent

| In/Out | Sent By | Message | Date Created ↓ | Actions |
|----------------------------------|---------|---------|----------------|---------|
| There are no records to display. | | | | |

Create

Message *

Send Message

- IV. To open and view the message, click the 'View' button.

Messages

Message SBA Agent

| In/Out | Sent By | Message | Date Created ↓ | Actions |
|--------|----------------|--|-------------------|------------------------------|
| ↑ | Evon Prescilla | The following question will allow the applicant firm to proceed with an Economically Disadvantaged WOSB (EDWOSB) application. To apply as an EDWOSB, a firm must show that it is 51% owned and controlled by one or more economically disadvantaged women. | 6/17/2020 1:44 PM | View Message |

2.21 Profile

You can view and update your profile information in the application

- I. Click on the Profile menu, and you can view your profile name.
- II. To update your profile details, click on the Update Profile menu, and you will be redirected to the Sign-in page.
- III. Enter your email address and password and sign in.
- IV. After signing in, you can view your account information.
- V. In the Login Information section, you can add email and change the password
- VI. Click the 'Add email' button, enter the password, and you can add a new email.
- VII. Click the 'Edit' button, enter the password, and you can update your password.

Your account

LOGIN INFORMATION →

Email addresses [+ Add email](#)

jeniprescilla12@aol.com

Password [Edit](#)

- VIII. In Two-Factor Authentication, you can add a Phone number. Click on Add phone number button, enter password, and add phone number.
- IX. Add Authentication apps by providing nickname, scan the QR code, enter the temporary code from your app, and submit.
- X. Add your security key by providing the security key name.
- XI. Add your PIV CAC cards.
- XII. Generate a new backup code.

TWO-FACTOR AUTHENTICATION 🔒

| | |
|--|------------------------------------|
| Phone numbers | + Add phone |
| Authentication apps | + Add |
| Security key | + Add security key |
| PIV CAC Cards | + Add |
| Backup Codes <i>generated</i> June 15, 2020 at 1:20 PM | + Get new codes |

APPLICATIONS ⚙️

| | |
|---|--------------------------------|
| SBA_test Associated June 15, 2020 at 1:21 PM | Revoke Consent |
|---|--------------------------------|

XIII. In the application section, click 'Revoke Consent'. Your information will no longer be shared with SBA SSO. To access SBA SSO in the future, you must give your consent to share your information. You can give consent by going to the SBA SSO site and logging in.

XIV. In Device section, Click the event button to view the Device's account history details

DEVICES 🔗

| | |
|---|--|
| Chrome 83 on Windows 8 <small>From 108.48.229.44 (IP address potentially located in Alexandria, VA)</small> | June 17, 2020 at 2:30 PM Events |
| Chrome 81 on Windows 8 <small>From 108.48.229.44 (IP address potentially located in Alexandria, VA)</small> | May 5, 2020 at 3:58 AM Events |

XV. In the Remembered browser section, Click 'Forget all browsers' button to disconnect all remembered browsers from your login.gov account.

REMEMBERED BROWSERS 🔗

Use this to disconnect all remembered browsers from your login.gov account [Forget all browsers](#)

XVI. View the Account History

| ACCOUNT HISTORY ↗ | |
|---|--------------------------|
| Signed in with second factor <small>From 208.48.228.48 IP address potentially located in Alexandria, VA</small> | June 17, 2020 at 2:30 PM |
| Signed in with second factor <small>From 208.48.228.48 IP address potentially located in Alexandria, VA</small> | June 17, 2020 at 2:20 PM |
| Signed in with second factor <small>From 208.48.228.48 IP address potentially located in Alexandria, VA</small> | June 17, 2020 at 1:59 PM |
| Signed in with second factor <small>From 208.48.228.48 IP address potentially located in Alexandria, VA</small> | June 17, 2020 at 1:50 PM |
| Signed in with password <small>From 208.48.228.48 IP address potentially located in Alexandria, VA</small> | June 17, 2020 at 1:50 PM |
| Signed in at SBA SSO | May 5, 2020 at 3:59 AM |

XVII. In Account Management, click the 'Delete' button to delete your account.

ACCOUNT MANAGEMENT

[Delete](#) Delete your account

2.22 Help

The applicants can reach out to SBA for Help, by creating a case and submitting the same through the portal using the Help menu at the top.

- I. Click on the 'Help' menu.

Help



- II. Click on the “New Request’ and create a support request by providing the title, select support type, search and choose the case, give the description, upload the attachment, and click on the ‘Submit’ button.

Create support request

Title *

Case
 x Q

Support type *

Description *

Attach a file
 | No file chosen

- III. Your request is created as case and displayed in the list
- IV. You can search your cases by entering the keywords in the search box and click the ‘Create’ button to create another request

Help

Total request(s): 1

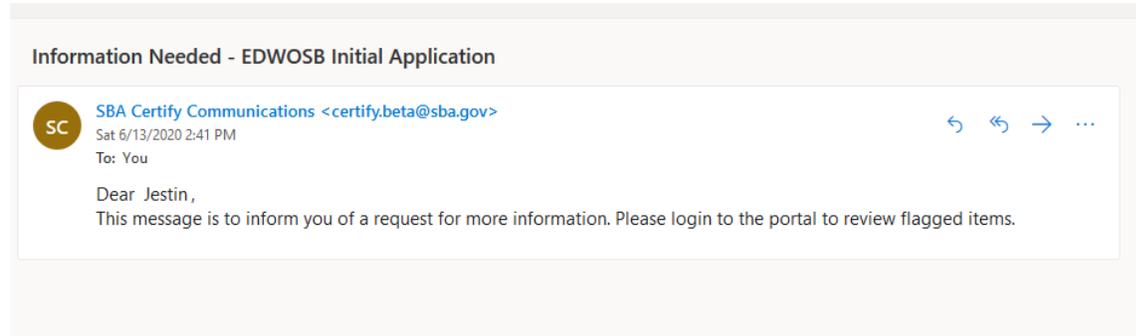
Q

| Request ID | Title | Description | Case | Status | Created On |
|-------------|-------------------|-------------|----------------------------|--------|-------------------|
| CASE-D11034 | Eas Certification | WOSB/EDWOSB | EDWOSB Initial Application | Active | 6/17/2020 3:33 PM |

Welcome **Test user**
 Last logged in at 6/17/2020 5:18:25 PM

2.23 Request for Information

Once the application is submitted to SBA, the validation and approval process begins. If an SBA agent feels the information or document submitted is not sufficient, he/she may 'Request for Information' by sending an email notification, depicted below:



Additionally, when logging in to the portal and viewing the application, a new 'Review Requested' card appears in the Application Overview page highlighted in red.

The user should review the application and provide a response to the SBA request.

1. Navigate to the Application Overview page
2. Click the 'Review Requested' link.

Overview
Delegates
Messages
Documents

Application Overview

Review Requested
2

Status: Need more information

Last Update: _____

Started: _____

SBA Basic Eligibility

Status: Completed

Last Update: 06/10/2020

Started: 06/10/2020

Ownership

Status: Need more information

Last Update: 06/10/2020

Started: 06/10/2020

Existing Qualified Certification

Status: Completed

Last Update: 06/10/2020

Started: 06/10/2020

3. That information requested page appears and displays all the review messages
4. Click on the section name to review the request

5. Navigate back to the Information Requested page

6. Submit the information by clicking 'Submit' button

7. A confirmation pop-up will appear. Click 'Submit' button on the pop-up to finalize the submission

The applicant also receives a deficiency letter from the SBA agent. The applicant can view and download the deficiency letter from the My Documents section.

1. Navigate to the Dashboard page
2. Scroll down to the My Documents section
3. Click the 'File name' to download and view

Women-Owned Small Business (WOSB)

NOTE: Economically-Disadvantaged Women-Owned Small Business (EDWOSB) applicants need to complete a WOSB application.

| Activity | Type | Activity Status | Submission Date | Decision | Expiration Date |
|--------------------------|------|-----------------|-----------------|----------|-----------------|
| WOSB Initial Application | WOSB | Submitted | 7/10/2020 | | |

My Documents

Total documents uploaded: 10

| Type | File Name ↑ | Type of Document | Uploaded By | Created On ↓ |
|------|----------------------------------|-------------------|-------------|-------------------|
| | Deficiency Letter Screening.docx | Deficiency Letter | | 6/13/2020 2:49 PM |

Or the applicant can view and download the letters from the All Documents page,

1. Navigate to the All Documents page by clicking 'Documents' menu
2. Click the 'File name' to download and view

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3.0 Troubleshooting

3.1 Certify Knowledge Base

beta.Certify.sba.gov provides a knowledge base, which is a self-serve online library of information that includes certification eligibility, Forms, Documents to be uploaded, Checklists, FAQs, Training media, and user guides for easy reference. Please visit the [beta.Certify Knowledge Base](https://beta.Certify.sba.gov) for assistance.

3.2 Certify Support Team Contact

If you require assistance, please go to the Help tab on beta.Certify.sba.gov.

4.0 Tell Us How We're Doing!

4.1 Feedback

beta.Cerify.sba.gov would love to hear your feedback. Please submit your [Feedback](#) here.

5.0 Glossary

| Term | Definition |
|---|---|
| Small Business Administration (SBA) | The Small Business Administration is an independent agency of the federal Government to aid, counsel, assist and protect the interests of small business concerns, to preserve free competitive enterprise and to maintain and strengthen the overall economy of US nation. |
| Women-Owned Small Business (WOSB) | Women-Owned Small Business (WOSB) is a firm/company with at least 51% directly owned and controlled by one or more women who are US Citizens. |
| Economically Disadvantaged Women-Owned Small Business (EDWOSB) | Economically Disadvantaged Women-Owned Small Business is a subset of Women-Owned Small Business. Specifically, EDWOSB is a WOSB whose owner and/or manager claims |

| | |
|---|---|
| | economic disadvantage. |
| 8 (a) Business Development Program | The 8(a) Business Development (BD) Program offers a broad scope of assistance to firms that are owned and controlled at least 51% socially and economically disadvantaged individual(s). |
| Third-Party Certifiers | A third-party certifier is a national certifying entity approved by the Administrator that may engage in the certification process for the WOSB Program. |
| System for Award Management (SAM) | The System for Award Management (SAM) is a Federal Government owned and operated free web site that consolidates the capabilities in the Central Contractor Registration (CCR)/FedReg, the Online Representations and Certifications Applications (ORCA), and the |

| | |
|--------------------|--|
| | Excluded Parties List System (EPLS). |
| DUNS Number | The Data Universal Numbering System (DUNS) Number is a unique nine-character identification number provided by the commercial company Dun and Bradstreet. |
| TIN Number | A Taxpayer Identification Number (TIN) is an identification number used by the Internal Revenue Service (IRS) in the administration of tax laws. It is issued either by the IRS or the Social Security Administration (SSA). Choices provided for the TIN type include Employer Identification Number “EIN” or Social Security Number “SSN.” |
| MPIN | The Marketing Partner Identification Number (MPIN) is a self-created password from SAM.gov. |
| NAICS | The North American Industry |

| | |
|------------|---|
| | <p>Classification System (NAICS) is the standard used by Federal statistical agencies in classifying business establishments to collect, analyze, and publish statistical data related to the US business economy.</p> |
| CVE | <p>Department of Veterans Affairs Center for Verification and Evaluation (CVE) is the First Verification Program that affords verified firms owned and controlled by Veterans and Service-disabled Veterans the opportunity to compete for VA set-asides.</p> |