

Apply – Part 1

Establishing SBA Basic Eligibility

SBA Basic Eligibility

Once you have created an account and claimed the business, the next step is to complete the SBA basic eligibility questions, which should automatically populate on the screen during your first login.

Basic eligibility includes confirming the primary NAICS code data pulled from SAM and the firm's business size. For confirming the Size, 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 you are considered small in accordance with size standards and eligible for Government contracting.

If the firm's business size does not meet the standards set by NAICS, then the firm is not eligible for the SBA small business program.

If you do meet all the eligibility requirements, after completing the questionnaire, you will be redirected to the dashboard where you can start creating the WOSB or EDWOSB application.

Assigning a Delegate to the Application

In applying for WOSB or EDWOSB, you must first decide if you will be completing the application or if you will be assigning a delegate to complete it on your behalf.

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.

You can assign a delegate one of two ways. Once you create the WOSB application, the portal displays the option to add a delegate or you can add the delegate in the application overview page. We are going to walk through adding a delegate to a new application from the dashboard.

Click 'New application' in the dashboard.

Select 'yes' for the question, 'Are you assigning a delegate for this application?'

Click the 'Assign Delegate' button.

Fill in the delegates information, their first name, last name, and email.

Click the 'Send Invitation to Collaborate' button.

If you ever need to update the delegate's information, enable or disable the delegate, or send reminders, do so, by selecting the down arrow icon next to their 'Status' and choose the appropriate option.

However, if you are happy with the addition of the delegate you have input go ahead and select 'Next'.

The system will send an invite to the delegate's email id inviting him or her to collaborate.

The invited delegates receive an email for notification of collaboration. They will log in to the beta.Certify.sba.gov portal by clicking the link in his/her email. On logging in he/she shall find the application in the dashboard. They can start providing the responses and documents for the questionnaire 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.

Establishing WOSB Program Eligibility

Verifying Ownership by Women/WOSB Eligibility

At this point, either yourself or an assigned delegate acting on your behalf will complete the next steps.

The next step of the process in submitting the application is verifying the Women's ownership and eligibility. To do so, confirm your responses from the SBA basic eligibility questionnaire. If you need to change any of these answers you may do so by selecting the 'Edit' button.

In order to be eligible for applying for Small Business Programs, the Women-owned small business has to 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

Verifying Ownership by Women/EDWOSB Eligibility

If you would like to apply for EDWOSB, you must meet the eligibility criteria of the WOSB program and meet the criteria for the EDWOSB program. The eligibility criteria can be found under the 'Prepare' tab on the Home page at beta.Certify.sba.gov.

To complete the ownership portion of the application navigate to the 'Application Overview' page and click 'Ownership'. The portal will display a 'Declaration of Statements'. Read through this information and click the 'Accept' button.

Now you should see the 'Women Ownership' questionnaire. For the question, 'Are you 51% owned and controlled by one or more economically disadvantaged women?' choose 'Yes' to proceed to the EDWOSB application. Alternatively, choose 'No' to continue with the WOSB application.

Verifying Firm Ownership

For both the WOSB and EDWOSB program, you need to confirm your firm ownership by answering the following questions, providing written explanations, and uploading documents if necessary.

Then proceed to confirm your Direct ownership. If you have the direct ownership, then select 'yes' and proceed. Alternatively, if the firm is owned by another business entity, provide a written explanation in the comment box and upload the supporting documentation for the other business entity.

Next, verify the remaining questions and select next.

Verifying Business Structure

After confirming the firm ownership, you need to answer a few questions related to your business type and should provide the requested supporting documents corresponding to your business type.

These documents verify your eligibility for the WOSB or EDWOSB program and correspond with the required documents per the 'Prepare' page you may have navigated to from the menu bar on the Home page.

After completing the questionnaire related to ownership, the summary page is displayed with your answers for confirmation. If you need to change any of these answers you may do so by selecting the 'Change answer'. After confirmation, hit submit and proceed to the next card.

Applying with Existing Qualified Certifications

You may also be interested in applying with existing qualified certifications.

These certifications include 8(a) Certification, TPC Certification, and CVE Certification. The portal allows for the attaching of any one of these certificates.

To begin, navigate to the Application overview page. Click the 'Existing Qualified Certifications' link. If you are an EDWOSB applicant, it directs you to the 8(a) certification section. Otherwise, it directs you to the TPC certification page.

Please go through the questionnaire, continuing to select 'next' after inputting your responses.

Once you have completed all of the questions you will proceed to the Summary page.

Please confirm your responses.

If you need to change any answer, please select 'change answer' otherwise please select submit.

If you are an EDWOSB applicant with an 8(a) certification you will automatically be taken to Privacy Statement to begin the Attestation and Submission.

Likewise, if you are WOSB applicant with third party certification, you will automatically be taken to Privacy Statement to begin the Attestation and Submission process.

The Attestation and Submission will be reviewed later in the training.

Verifying Ownership Control

You may be required to complete additional cards, such as the Control card, Individual Contributors Card, or EDWOSB Financials card, which will populate on the Application Overview page upon completing the Existing Qualified Certification.

The next section verifies the firm's eligibility for the WOSB or EDWOSB program by verifying the applicant's control over the business.

Please select 'Control' from the Application Overview page.

These ownership control questions are displayed one by one for the applicants to respond and upload the supporting documents.

Please respond to the questionnaire and select 'next' once you have responded to each question.

Once complete, the summary page shows the responses provided for your verification and confirmation. If you need to change any of these answers you may do so by selecting the 'Change answer'. After confirmation, hit submit at the bottom of the page and proceed to the next card.

EDWOSB Financials

Now you may find the 'Economic Disadvantage' card in the application overview page to be completed.

Please select 'Economic Disadvantage' from the Application Overview page.

To qualify as an economically disadvantaged business within the women's contracting program, you should upload the required tax documents and documentation confirming your net worth and assets.

You may also be required to provide financial documentation for a WOSB application if you have not previously been certified.

Please go through the questionnaire responding to each question and uploading documents where required. Select 'next' at the bottom of each section to proceed.