

## Apply – Part 2

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 'Change answer'. After confirmation, hit submit at the bottom of the page and proceed to the next card.

### Adding Individual Contributors

You may need to add information regarding individual contributors. You can add an individual contributor from the Application Overview page.

Click on the 'Individual Contributor' card.

Please read through the instructions and add an individual contributor where applicable.

Go to the appropriate section and select the 'add another...' link.

Add an individual contributor by selecting the blue 'Add' button and inputting the individual's name and email address.

To send the invitation, select 'Send Invitation to Collaborate'.

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

The individual contributor will receive an email notifying them to log onto the beta.Certify portal and provide the required information and documents in the 'Individual Contributor' questionnaire.

You can check the Invitee's status by selecting 'Invitee' on the left hand menu bar under 'Individual Contributors'.

### Logging Information as an Individual Contributor

An individual contributor will receive an email from the application requesting they complete a questionnaire and upload the required documents. However, they will first have to go to the new certify portal to create an account.

Please refer back to the training on creating an account if instructions are needed.

After the individual contributor has created an account and logged in, they should see the Individual Contributor dashboard.

From this dashboard select the organization title and complete the questionnaire.

The questionnaire will vary in length and content base on the type of Individual Contributor responding. For example, this is an Individual Contributor who is a board member. The questionnaire is significantly shorter than that of a spouse.

The individual contributor will enter their responses to the questionnaire and upload the required documents.

Select 'next' to proceed to each question.

Upon completing the required questionnaire and uploading the appropriate documents, reviewing the summary, selecting the appropriate box confirming their understanding of the terms and selecting sign – the Individual Contributor has electronically signed their portion of the application and submitted their information.

Once an Individual Contributor has completed their information, their status will change under the Status section to 'Completed'.

Firm owners can check the status of an Individual Contributor under the Individual Contributor's card in their Firm Owner's application.

### **Firm Owner Questionnaire**

Additionally, the Firm Owner Questionnaire is to be completed when a firm does not have an existing Certification and can be accessed directly from the Individual Contributor card.

### **Attestation and Submission**

Once all the required information and documents are submitted, click the final 'Submit' button, the Program Self-Certification Summary and Attestation page will appear.

Read through each summary and statement carefully. Click continue at the bottom of each page.

On the Attestation page read through and confirm each statement by selecting the box next to each statement.

By selecting the 'Attest and Submit' button, you declare that all the statements, the information provided, and any documents submitted are true to the best of your knowledge. By clicking the 'Attest and Submit' button, you are certifying that you are representing on your behalf and on behalf of the woman-owned small business or economically disadvantaged woman-owned small business whose information is provided in this certification. Additionally, any documents 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 or civil penalties.

Please note that only the Firm owner can attest and submit the application.

## Responding to “Request for More Info”

After submitting the program application with the necessary documents, SBA will review and validate the provided information.

If an SBA Agent finds that he or she needs more information to process the application further, he or she may request more information by triggering a notification that will appear on the application. An email will also be sent regarding this notification.

Once you receive an email notification requesting additional information go back to the beta.Certify portal and login. In the dashboard under ‘My Documents’, you should notice a new document ‘Deficiency letter’ is added.

Scroll down to ‘My Documents’ to see the deficiency letter.

You may download the deficiency letter to learn more about the details requested.

Open the link for the application. Go to the Application Overview page.

You should see ‘Need More Information” on one of the cards highlighted in red.

Select the card.

Clicking on the highlighted card displays the information on how to submit the documents or responses requested under ‘Need.

Please be aware that you will not be able to submit anything beyond the due date which you can find in the due date column.

Select the title under the Review Section column to be directed to the relevant section and to provide the documents or responses requested.

After providing the requested documents or responses, navigate back to the Information Requested page by selecting ‘Information Requested’ under Review Requested in the left menu bar.

Submit the information by clicking the ‘Submit’ button under the Actions column.

A popup should appear, requesting confirmation regarding the submission of the documents.

Select submit to finalize the submission of the information requested.

The documents have now been submitted back to the appropriate SBA agent for review and will no longer be editable.

If you navigate back to the Application Overview page you will notice your status has changed to Information Received

Once an analyst has received and confirmed the updates the status changes to complete.

