WOSB Program

Quick Start Guide for Applicants

Task	Instructions
	Getting Started
Before Starting Your WOSB/EDWOSB Application	Visit **beta.Certify.sba.gov** and navigate to the '**Am I Eligible'** page from the Menu bar or click the button on the home page. At the bottom of this page you can see, the '**About Your Business'** section. Answer all of the questions listed in this section to check your eligibility for the WOSB Program. Please keep in mind that it is not a confirmation of eligibility. You must apply and be approved by SBA. Navigate to the '**Prepare'** page and review the documents that will be required when you apply. It provides links for each program, which directs you to the Preparation Checklist of that program. Alternatively, you can scroll down to navigate the checklist. Gather the necessary documents. Documents should be saved as 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.
Obtain a DUNS Number	Visit DUNS Request Service to apply for your Data Universal Numbering System (DUNS) number.
Register in the System for Award Management (SAM)	Visit SAM.gov and click "Create an Account" in the top right and proceed to create an Individual Account. SAM.gov will request your DUNS number. After you have submitted your information, your account must be approved in SAM to apply in Certify; the approval process can take several days.
Create Your beta.Certify Account	To create an account, you should have a valid email address.

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	Visit **beta.Certify.sba.gov**. The landing page offers both Federal and applicant firm resources. The applicant firm can get started by scrolling to the section just below the Federal employees' portion of the landing. Select the '**Get Started**' button. If the applicant firm already has the DUNS number and SAM account, select 'Create Account.' Accept the terms and conditions and then select '**Create an Account**' on the Login.Gov portal. Enter your email address and **submit**. You will receive an email with a link from sba.gov to **confirm your email** address. After confirming your email address, you can set up a password and two-factor authentication for your account. There are multiple options to authenticate your account. Choose any method which suits you best. Do remember to store the password and authentication method in a secure location. Users should utilize this second authentication method whenever logging in with the credentials.
Claim your business	During your first login to beta.Certify portal, you will claim or link your business. To claim your business, have the DUNS Number, TIN or EIN Number, and MPIN Number provided during the SAM Registration. Please note that your SAM.gov account should be active as well. Enter the following details on the claim business page DUNS Number, TIN or EIN Number, and MPIN Number. After entering your details, click the '**Find**' button. Basic information about the applicant firm will populate from the SAM profile. Verify the details and click the '**Claim**' button. SBA will only accept submissions and digital signatures from qualifying business owners. If you are NOT the business owner, please do not proceed. To protect personal financial information entered into the system, only the qualifying business owner will have access to their business records.
SBA Eligibility Question	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.

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	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. Complete all the questions and provide the necessary data and documents for the questions, if required. For further detail, please refer to beta.Certify.sba.gov External User Guide Section 2.3 'SBA Basic Eligibility'. If your Firm is not eligible for Government Contracting, then you shall not be able to proceed further with your application.
	Accessing and Completing your Application
Fill out your Application	Login to beta.Certify portal. On the Dashboard, select the WOSB/EDWOSB program application. Assign a delegate, if necessary (refer 'Assign Delegate' section below for more instructions) or proceed filling out the application. Complete the Women Ownership section. Upon completing this section, the application overview page will appear with sections like Existing Qualified Certification, Control, EDWOSB Financial, and Individual Contributors as cards. The application may enable or disable cards based on your answers to the questions. Select each section and answer all the questions, provide the necessary data and documents to the questions, where required. In the Individual Contributor card, add all the contributors to invite and complete an application. Everyone contributing to your Firm must provide their contribution details before you can submit your Firm's application. See 'Add Contributors' below for more instructions. You should also complete your part by selecting the firm owner questionnaire link.
Assign Delegate	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. 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.

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	From the Application Overview page, click 'New Application. Select 'Yes' for the question 'Are you assigning delegate for this application?'. Then select the Assign Delegate button. A pop up appears requesting the delegate's First Name, Last Name, and email. Select the 'Send Invitation to Collaborate' button. The delegate receives an email. 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.
Add Contributors	Everyone contributing to your Firm must provide their contribution details before you can submit your Firm's application. The individuals include each person whose ownership demonstrates that the firm is 51% owned by one or more women, every firm owner claiming economic disadvantage and their spouse if they are currently married or legally separated, and each individual participating on the board of the WOSB/EDWOSB firm Navigate to the Application Overview page then select the 'Individual contributor' section. There you can find the link to 'Add another WOSB/EDWOSB Firm owner, if applicable' or 'Add spouse of an EDWOSB' or 'Add other WOSB/EDWOSB Individuals, if applicable'. Click on the link and proceed with filling out the section. Provide the firm owner details and select Send Invitation to Collaborate. It sends an email invite to the contributor with the link to the Certify application. Each invited contributor must create an account and login to the portal. After login, he/she must provide the necessary details to complete the application.
Make Edits to Application Sections	Login to beta.Certify portal and navigate to the Application overview page. Select the card (Ex. Ownership) where you wish to make edits. You can start editing your responses to the questions and make sure to Save before proceeding to the next section by clicking the submit button. Or navigate to the Summary page of that card and select the Change Answer link for the respective question and make the necessary edit. Select Next to complete your edit. Please note, you cannot make edits to Application once it is submitted to SBA for processing.
Upload and View Documents	You will be prompted to upload documents only while answering questions in beta.Certify portal. You will not be able to upload documents directly to the documents tab or within the messages tab. Documents should be saved

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	as 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 corresponding question to upload the document. For example, choose to answer 'Yes' for the question 'Is the applicant firm at least 51% owned and controlled by US citizens?'. Select the 'Proof of US Citizenship' button. It directs you to the Upload Document page. Select the 'Add file' button. It displays a window. Choose a file to upload and select the 'Add files' button. Select the 'Complete upload' button to finish the upload. The uploaded documents will be displayed under each question. You can also navigate to the Documents tab at the top of the application overview page to view all the documents attached to the application in one place.
Submit your Completed Application	Once all the required information and the documents are completed and uploaded, the user must submit the application to SBA by attesting the Program Self-Certification Summary. This can only be done by the applicant. Delegates would not be able to perform this step. Navigate to the Application Overview page. Select the Individual Contributors link. Then navigate to Invitee section. Select the 'Next' button. Read and complete the declaration form by selecting each checkbox. Select the 'Attest and Submit' button. If you navigate back to the application dashboard page. You can see that the 'Activity Status' column has changed to 'Submitted.'
	What to Expect After Applying
Check the Status of your Application	Login to your beta.Certify account. On the dashboard page, view the 'Active Status' column of the Application to know the status.

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Correspond with SBA after Submission	Login to beta.Certify account. Click on the 'Messages' tab found at the top of the application menu on the Application overview page. Applicants will be able to communicate with the SBA agents by hitting the 'Message SBA Agent' button. Applicants will be able to communicate with the SBA agents only after the Application has been assigned.
Revise an Application Returned During Screening	If the SBA requires additional information, the application will be returned to the applicant. The applicant will receive an email notification to log into beta.Certify.sba.gov to review the SBA communication there. Under the 'Documents' section, you will find a letter from the SBA analyst documenting additional information needed from the firm to accept the application for processing. **The SBA analyst will re-open the sections of the application that require further information.** Select the application in the Application Overview page. You will see 'Review Requested' highlighted in Red indicating the need for this section to be updated. Click on the identified section to address the issues mentioned and upload new documents if necessary. Should you have any questions about the SBA's request for additional information, use the Messages function to communicate with an SBA analyst. Note: SBA will advise each applicant within 15 calendar days whether the application is complete and suitable for evaluation. SBA will make its final determination within 90 calendar days after receipt of a complete package.