



U.S. Small Business
Administration

beta.Certify.sba.gov
FAQs

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1.0 Purpose of WOSB FAQs

The beta.Certify.sba.gov FAQs address frequently asked questions about the IT application that enables application for WOSB certification and management of certifications, once made by SBA. Program FAQs should be consulted for WOSB Program information. This document captures frequently asked questions concerning the navigation and use of the IT application. It will be updated periodically to reflect new questions asked by users and their answers.

2.0 SBA WOSB Certification Program Implementation

2.1 How is beta.Certify.sba.gov different from Certify.sba.gov?

beta.Certify.sba.gov is the IT application for processing applications to the new SBA certification program for Woman Owned Small Businesses. The Certify.sba.gov site has held *self-certifications* made by WOSB firms. After October 15, 2020, SBA will no longer support self-certification. However, firms with Certify.sba.gov accounts who self-certified as WOSBs and uploaded associated material will be able to access their accounts to retrieve their previous self-certifications and documents through March 31, 2021.

2.2 How do I create an account the beta. Certify system?

You can access the [How-To Video](#) and [Quick Start Guide](#) for a demonstration of how to create your beta.Certify account.

2.3 How do I claim my business in beta.Certify?

You can access the [How-To Video](#) and [Quick Start Guide](#) for a demonstration of how to claim your business in beta.Certify account.

2.4 How does SBA determine if I qualify as a small business?

See SBA's [Size Standards page](#) for explanation of how SBA determines that a business is small.

2.5 What are the minimal browser types/versions that will work with beta.Certify.sba.gov?

beta.Certify.sba.gov is compatible with the latest Google Chrome and Microsoft Edge browser.

2.6 Will the application function on my mobile device?

Yes, the application will function on your mobile device.

2.7 Who do I contact if I need help?

Use the 'Help' link on the top bar of the beta.Certify homepage to request assistance of any kind, to give feedback about the system, and to request new functions and features you believe will improve the user experience.

2.8 What is Login.gov?

Login.gov is a service that offers secure and private online access to government programs, such as federal benefits, services, and applications. With a login.gov account, you can sign into multiple government websites with the same email address and password.

2.9 Why do I need to register with Login.gov?

Login.gov is a single sign-on solution for US government websites as well as login.gov is a convenient and secure option for you. beta.Certify.sba.gov wants to take advantage of the efficiency and security of login.gov as a shared technology platform. Once you have created an account at login.gov, the system will take you back to beta.Certify.sba.gov.

2.10 What is SBA Connect?

SBA Connect is a web-based application designed to provide Single Sign-On capabilities for SBA users. It allows users to log in once and have access to multiple applications based on their role in the organization.

2.11 Why do I need to register with SBA Connect?

SBA Connect provides Single Sign On capabilities and is designed for SBA's IT Modernization Program. The SBA Connect application is integrated with Login.gov for User Management, Authentication, and Multi-Factor Authentication.

Existing Users can log into the application with their Login.gov account. If the User does not have an existing Login.gov account, they can follow the link "Create a New Account" from the Login.gov Sign in Page and follow the steps to create a new account.

Users will benefit from the Single Sign On capabilities of SBA Connect by gaining secure access to various SBA resources through one sign in.

2.12 What is multifactor authentication and why do I need to use it?

Multi-factor authentication is defined as a security mechanism that requires an individual to provide two or more credentials to authenticate their identity. It provides additional security by requiring a second form of authentication and delivers strong authentication via a range of easy to use authentication methods.

2.13 What if my business information in the system is incorrect or needs to be updated?

If you find that your business information is incorrect, you need to update your business information in SAM profile. Changes to the SAM profile can take up to 72 hours to display in beta.Certify.sba.gov.

2.14 How do I update my corporate data?

You should update your Corporate data in SAM profile. Changes to the SAM profile can take up to 72 hours to display in beta.Certify.sba.gov.

3.0 Becoming Certified WOSB/EDWOSB

3.1 How do I check the status of my application?

Log in to your beta.Certify.sba.gov account and view the 'Activity Status' column for your application on the dashboard.

3.2 How do I communicate with SBA after I've submitted my application?

Click the 'Messages' tab found in the top menu on your application overview screen. You will be able to correspond with an SBA analyst after your application has been assigned for processing.

3.3 How do I upload and view documents?

You 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 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 50MB or less. Do not password protect any files.

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.

3.4 Who can help me with my business's readiness for the certification process?

The SBA works with several local partners to counsel, mentor, and train small businesses. Please visit our [local assistance page](#) to search for a nearby resource partner.

3.5 Are there any file size upload restrictions?

The file size must be 50MB or less.

3.6 How do I change my password?

- Login to beta.Certify.sba.gov portal
- Navigate to the Profile page from the menu at the top.
- Click 'Update Profile' button directs you to Login.gov profile
- Edit your password there

3.7 How do I manage my user information in beta.certify.sba.gov?

You can manage your information in beta.Certify.sba.gov through Login.gov profile only.

- Login to beta.Certify.sba.gov portal
- Navigate to the Profile page from the menu at the top

- Click the 'Update Profile' button directs you to Login.gov profile. Here you can modify/update your information.

3.8 Why won't the system let me proceed to the next step without uploading my documents?

Uploading documents to the question confirms/supports your response to the questionnaire. To help to ensure that application submissions are not lacking information for processing, the system will not allow you to skip a document upload. Missing any document leads to an increase in your application processing time OR may lead to denial of your application.

3.9 What is a 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 prior to submission. This cannot be fulfilled by a delegate.

3.10 How do I assign delegates?


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.

- Click the 'New application' link in Dashboard
- Select 'Yes' for the question 'Are you assigning delegate for this application?'
- Click 'Assign Delegate' button
- Fill in delegates first Name, last Name, and email
- Click the 'Send Invitation to Collaborate' button
- Click the 'Next' button to complete the process.

This sends an email notification to the delegate inviting him/her to fill the application on your behalf.

3.11 How do I remove delegates?

You need to submit a request to remove the delegate by using the Help in the menu bar. Then you can disable the delegates.

- Navigate to the Application overview page
- Navigate to the Delegates tab
- By clicking the icon  of the particular record, you can disable delegate

The delete feature is not a part of this release.

3.12 How do I withdraw my application?

You can reach out to SBA by logging in beta.Certify.sba.gov and using the Help in the menu bar.

3.13 How do I send messages to the SBA?

Login to beta.Certify.sba.gov

- In the Dashboard, click on the link of the program application
- Navigate to Messages tab in the application overview page

- Click the 'Message SBA Agent' button
- Enter your message
- Click the 'Send message' button.

The reply sent by the SBA agents also appears here.

3.14 What is the typical response time for questions directed to SBA staff?

Usually within 24 to 48 hours.

3.15 How do I ask questions regarding the application process?

beta.Certify.sba.gov landing page provides links for each program under 'Have Program-Specific Questions?' section. You can ask a question by clicking on the respective link of the program application which you are looking for.

You can also go to the Help tab on the Home page. You can find answers for your specific questions in [Knowledge Base](#) as well.

3.16 I received a suspicious email regarding my application should I respond?

Do not respond and reach out to SBA under the Help tab in the menu bar at beta.Certify.sba.gov.

3.17 How do I cancel my application?

To delete the application you have started, access the 'Help' form at the top bar of your page, complete the information prompts and submit the request.