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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:

1. 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

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
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

[LOGIN.GOV](#)

**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.

[Confirm email address](#)

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
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
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.

- **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.

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

- **Government employee ID**
  Insert your government or military PIV or CAC card and enter your PIN

- **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.

---

**Continue**
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
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.

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

Find   Claim

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.
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.
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

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

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.

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.

### 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.

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.
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  

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
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.
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.

![Image of Firm Ownership - Ownership Benefits]

**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.

![Image of Firm Ownership - Direct 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.
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
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 - 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.

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 to 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.

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

**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.

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.
   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.

### 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

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.
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.

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.
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.

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.

### 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

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

4. Choose a file
5. Click the ‘Add files’ button

6. Click the ‘Complete upload’ button
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.

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

2.15 Individual Contributor

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

1. 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 selection](image)

- Marital status

  ![Marital status selection](image)

- Social security number

  ![Social security number input](image)

- Date of birth

  ![Date of birth input](image)
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

Contact information

Best Contact Phone Number *  

Next

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
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. *

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
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.

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.
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.
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.

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.
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.
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.
2.15.5.6 Stocks and Bonds

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

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
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.

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

- 0-1
- 2
- 3+

Year End

<table>
<thead>
<tr>
<th>Most Recent Year</th>
<th>First Year Previous</th>
<th>Second Year Previous</th>
</tr>
</thead>
<tbody>
<tr>
<td>2018</td>
<td>2017</td>
<td>2016</td>
</tr>
</tbody>
</table>

**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

Enter "Total Tax" from 1040:
IRS Form 1040, page 2, line 16

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

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

TAXABLE INTEREST
IRS Form 1040, line 2b

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

TAX REFUNDS, CREDITS, ETC.
IRS Form 1040, line 22

CAPITAL GAIN(LOSS)
IRS Form 1040, line 6
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.

<table>
<thead>
<tr>
<th>Contributor</th>
<th>Role</th>
<th>Created On</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aaron Finch</td>
<td>Firm Owner</td>
<td>7/10/2020 11:31 AM</td>
<td>Completed</td>
</tr>
</tbody>
</table>

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.

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
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.

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’.
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.

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’.

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.
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: 447J9

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, Rojer Federer, 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.

<table>
<thead>
<tr>
<th>Full Name</th>
<th>Sign Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rojer Federer</td>
<td>6/16/2020</td>
</tr>
</tbody>
</table>
Attestation - WOSB/EDWOSB
Women-Owned Small Business
Program Self-Certification Summary

CHAPEL RETAIL ASSOCIATES, LLC
DUNS: 1316355
CAGE: 447J0

☐ 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.

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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.’

### 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.

IV. To open and view the message, click the ‘View’ button.
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.

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.
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.

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

XVI. View the Account History
XVII. In Account Management, click the 'Delete' button to 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.
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.

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.
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.
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 popup 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.

<table>
<thead>
<tr>
<th>Activity</th>
<th>Type</th>
<th>Activity Status</th>
<th>Submission Date</th>
<th>Decision</th>
<th>Expiration Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>WOSB Initial Application</td>
<td>WOSB</td>
<td>Submitted</td>
<td>7/10/2020</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

My Documents

Total documents uploaded: 10

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

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 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.Certify.sba.gov would love to hear your feedback. Please submit your Feedback here.
5.0 Glossary

<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Small Business Administration (SBA)</td>
<td>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.</td>
</tr>
<tr>
<td>Women-Owned Small Business (WOSB)</td>
<td>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.</td>
</tr>
<tr>
<td>Economically Disadvantaged Women-Owned Small Business (EDWOSB)</td>
<td>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</td>
</tr>
<tr>
<td><strong>8 (a) Business Development Program</strong></td>
<td>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).</td>
</tr>
<tr>
<td><strong>Third-Party Certifiers</strong></td>
<td>A third-party certifier is a national certifying entity approved by the Administrator that may engage in the certification process for the WOSB Program.</td>
</tr>
<tr>
<td><strong>System for Award Management (SAM)</strong></td>
<td>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</td>
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<tr>
<td><strong>Excluded Parties List System (EPLS).</strong></td>
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</table>

| **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 |
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.

**CVE**

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.