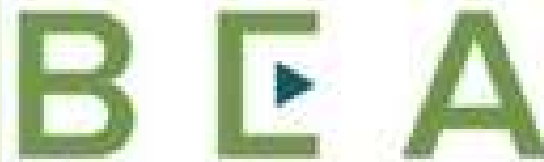


# The New WOSB Certification and [beta.certify.sba.gov](http://beta.certify.sba.gov)

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New Hampshire

**PROCUREMENT TECHNICAL  
ASSISTANCE CENTER**



# Introduction and Participant Guide

- ▶ NH PTAC –
- ▶ Stuff to know before we start
  - ▶ Muting
  - ▶ Chat function
  - ▶ Slides will be posted at [www.NHEconomy.com/ptac](http://www.NHEconomy.com/ptac) under Training Presentations
  - ▶ Session is being recorded
  - ▶ We will post the recording as soon as we're able



## A Quick Confession

- ▶ Usually (but not always) our presentations are drawn from long experience and diligent study
- ▶ Occasionally, we encounter a need to offer training on a new topic, like this one, where our experience is limited
- ▶ **We are eager to identify more volunteers to work through this application**



## What Will Certification Do for Me?

- ▶ Certified WOSB/EDWOSB may be eligible for contract set-asides
  - ▶ Set-asides are limited to approved [NAICS codes](#)
  - ▶ Further limited by “rule of two”
  - ▶ May become more prevalent once certification is in place
- ▶ May help establish your WOSB status with Primes
  - ▶ Relieves them of potential liability if subcontractor misrepresents as a WOSB
  - ▶ Eliminates any need for them to do due diligence



## When is Certification not a factor?

- ▶ Contracts in NAICS codes that are not listed for WOSB or EDWOSB
  - ▶ NOTE: All EDWOSB are also WOSB
- ▶ Contracts that are not set-aside
- ▶ Subcontracts with Prime contractors who are willing to accept your undocumented assertion of WOSB status



# Women's Contracting Program Eligibility

## MUST:

- ▶ Be a [small business](#) in your primary NAICS
- ▶ Be at least 51 percent owned and controlled by women who are U.S. citizens
- ▶ Have women manage day-to-day operations and also make long-term decisions
- ▶ The full eligibility requirements to qualify as a WOSB or an EDWOSB are fully defined in [Title 13 Part 127 Subpart B of the Code of Federal Regulations](#) (CFR). Firms can also get a preliminary assessment of whether they qualify at [SBA's beta.certify.sba.gov website](https://beta.certify.sba.gov).



## EDWOSB Eligibility Requirements

- ▶ To qualify as an economically disadvantaged business within the women's contracting program, a business must:
  - ▶ Meet all the requirements of the women's contracting program
  - ▶ Be owned and controlled by one or more women, each with a personal net worth less than \$750,000
  - ▶ 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
  - ▶ Be owned and controlled by one or more women, each \$6 million or less in personal assets
  - ▶ *Note that the personal net worth standards align with those of the 8(a) Business Development program (as of July 15, 2020)*



## A Presumption of Eligibility for:

- ▶ 8(a) Companies

- ▶ SBA also accepts a current, valid 8(a) certification if the 8(a) owner(s) are women. Firms must provide their 8(a) certification, annual review letters, or acceptance letter (if in their first year) through [beta.certify.sba.gov](https://beta.certify.sba.gov)

- ▶ CVE – verified veteran-owned small businesses

- ▶ SBA also accepts a current, valid CVE Verification if the owner(s) are women. Firms must submit evidence of verification by the Department of Veterans Affairs and supporting documentation through [beta.certify.sba.gov](https://beta.certify.sba.gov)
- ▶ Supporting documentation is “documentation confirming that it is owned and controlled by one or more women”





Are the 8(a) and CVE “Shortcuts”  
Working?

Maybe

Maybe not



## \*Third Party Certifications (TPC)

- ▶ There are four organizations approved by SBA to provide third-party certification. Contact them to find out about their certification process and any associated costs. They are:
  - ▶ [El Paso Hispanic Chamber of Commerce](#)
  - ▶ [National Women Business Owners Corporation](#)
  - ▶ [U.S. Women's Chamber of Commerce](#)
  - ▶ [Women's Business Enterprise National Council](#)
- ▶ Firms will need to provide proof of their third-party certification through [beta.certify.sba.gov](https://beta.certify.sba.gov) for initial processing. Read the instructions carefully to make sure you provide all the necessary information.



## Is the TPC “Shortcut” Working?

YES!

We have had at least one success at this time!




## Before You Start

- **Engage with your PTAC**
- Confirm eligibility NAICS
- Confirm SAM up to date
  - Woman Owner as POC!
- Active Login.gov account
  - <https://login.gov/>
  - *Tip – set up multiple alternative two-factor authentication routes*
- Prepare your documentation
  - Have PTAC Review for possible compliance concerns



# Getting Started

- ▶ Review [Qualifying NAICS Codes](#)
  - ▶ WOSB v. EDWOSB
- ▶ Is your primary code WOSB-eligible? (or EDWOSB?)
- ▶ What secondary codes should you list?
- ▶ Have your SAM up-to-date, particularly for NAICS
  - ▶ <https://www.sam.gov/SAM/>



## Check Your Eligibility and Understanding your Options

- If you know **for certain** that you're eligible, you may skip this step
- If you're not sure, you can take a simple test at: <https://beta.certify.sba.gov/am-i-eligible/>
- Certification Options [https://www.sba.gov/sites/default/files/2020-06/SBA\\_WOSB\\_Table\\_508\\_v8.pdf](https://www.sba.gov/sites/default/files/2020-06/SBA_WOSB_Table_508_v8.pdf)



# Gather Your Documents


- Document Checklists:

- <https://beta.certify.sba.gov/prepare/>

- Citizenship: Passport, birth certificate or certificate of naturalization
    - Ownership: “Corporate” documents –Sole Proprietor, Partnership, LLC, Corporation
    - Control: Up-to-date Resume, technical license
    - Economic Disadvantage **(if seeking EDWOSB)**:  
Personal and corporate financial docs (extensive list)
    - TPC, 8(a) or VOSB documents if applicable



## Other Data You Will Need at Hand

- Login.gov account (used for SAM Registration)
  - Your DUNS, EIN/TIN, and MPIN
    - (must be exact match to SAM)
  - Your primary NAICS code (per SAM)
  - Annual Revenue for each of the last 3 or 5 years (can choose 3 or 5 year average)
  - Number of employees (past 12 months)
  - Documents (.pdf) proving citizenship
  - Resume showing managerial capability
- 





## Log in and Claim Business

- <https://beta.certify.sba.gov/>
  - Log in with login.gov (same as you use for SAM and beta.SAM)
- Claim your Business
  - You will need DUNS, TIN and MPIN. (DUNS and TIN format is 9 digits\*, no spaces or dashes)
  - Should your TIN have a leading zero(s) you may need to leave it off or use "\*" in its place
- Steps listed at <https://beta.certify.sba.gov/external-user-guide.pdf> - pages 4-12.



## Eligibility

- Size by Primary NAICS (from SAM)
- Business Type
  - (for-profit and confirm info from SAM)
- Debarment (lack thereof)
- Citizenship
- You can walk through these elements on pages 13-16 of the User Guide



## 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.**”

See User Guide pages 16-17



# Document Ownership by Women

## Differs by Type of Entity

- ▶ Accept the WOSB Application Program Certification Declaration
- ▶ Select if firm owned by 51% by women
- ▶ Select if firm owned by 51% by ED women
  - ▶ Select No if applying for WOSB only
  - ▶ A lot more documentation required
- ▶ Confirm Direct Ownership (or trust information)
- ▶ User Guide pages 18 – 24



# Cards

- Each section of the beta.certify application is referred to as a “card” by SBA

## Application Overview

### SBA Basic Eligibility

Status:	<b>Completed</b>
Last Update:	07/01/2020
Started:	07/01/2020

### Ownership

Status:	<b>Completed</b>
Last Update:	07/01/2020
Started:	07/01/2020

## Existing Qualified Certification “Card”

<b>Existing Qualified Certification</b>	<b>Control</b>
Status: <b>Completed</b>	Status: <b>Completed</b>

- After ownership information
- Detailed on User Guide Pages 25 – 28
  - 8(a)
  - Third Party
  - CVE



# Ownership and Control

- Relatively straightforward:
  - Control of long-term decision making and day-to-day management/administration
  - Highest officer
  - Managerial experience
  - Upload resume
  - Technical expertise or License?
- Explained on User Guide pages 28 – 30

# Economic Disadvantage

- **User Guide Pages 30 – 52!!!**
- Only has value in certain NAICS
- Automatic for 8(a)
- **Do not** pursue this unless you need to! It's huge!
- NOTE: IRS Form 4506-T: Request for transcript – why? (IDK)

## **i** 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.





# Personal Summary

- ▶ User Guide Pages 53 - 54
- ▶ Invitees - Individual Contributors
  - ▶ Relevant if multiple women owners to achieve 51%
  - ▶ If EDWOSB, must document that women owning 51% all qualify
  - ▶ If EDWOSB, must include spouse's financial information (if applicable, married or legally separated)
- ▶ Invitees – Board Members
  - ▶ “Each individual participating on the board of the WOSB/EDWOSB firm must complete an application.”



## Attestation and Submission

- ▶ User Guide Pages 57 – 60
- ▶ **Can only be done by the applicant** – not a delegate




# Messages and Profile

- Messages - allows two-way communication with SBA
- Profile –
  - allows password changes, email additions
  - two-factor authentication methods, generate new backup codes
  - Can revoke SBA consent
  - Remembered browsers?
  - Account history



## Help

- User Guide Pages 63 – 64
- Instructions are provided on how to use the “help” utility (when logged in)
- Straightforward, click New Request, enter a title (for your reference mostly) and select support type. Provide description and submit.
- Approximately week or two before receiving response has been experience.



# Help, when not logged in

## How Can We Help You?

Support Category *(Selecting a Support Category will update options in Support Type)* \*

Support Type \*

Salutation

First Name \*

Last Name \*

Email \*

Zip Code \*

Phone Number

Business Name

DUNS Number \*



# Request for Information and Deficiency Letters

- ▶ User Guide Pages 65 – 67
  - ▶ You may receive requests for more information
  - ▶ Instructions on how to respond are detailed here, completed in system



## Helpful Resources

- ▶ Knowledge base – **user guides**  
<https://beta.certify.sba.gov/knowledgebase/>
- ▶ Specific FAQs within Knowledgebase
  - ▶ General
  - ▶ Application processing
  - ▶ Document issues
- ▶ FAQ (2020)  
[https://www.sba.gov/sites/default/files/2020-06/SBA\\_WOSB\\_FAQ\\_508\\_v10.pdf](https://www.sba.gov/sites/default/files/2020-06/SBA_WOSB_FAQ_508_v10.pdf)

# beta.Certify Knowledge Base

Click on one of the articles below to get more information or use our search to find what you're looking for.

**Search**

## Training Media

[WOSB/EDWOSB Apply and Submit](#)

[WOSB/EDWOSB Before You Apply](#)

## User Guides

[WOSB Applicant User Guide](#)

## Forms

[WOSB/EDWOSB Certify External Checklist](#)

[WOSB/EDWOSB Certify Quick Start Guide](#)

## Support

[WOSB/EDWOSB Certification Options](#)

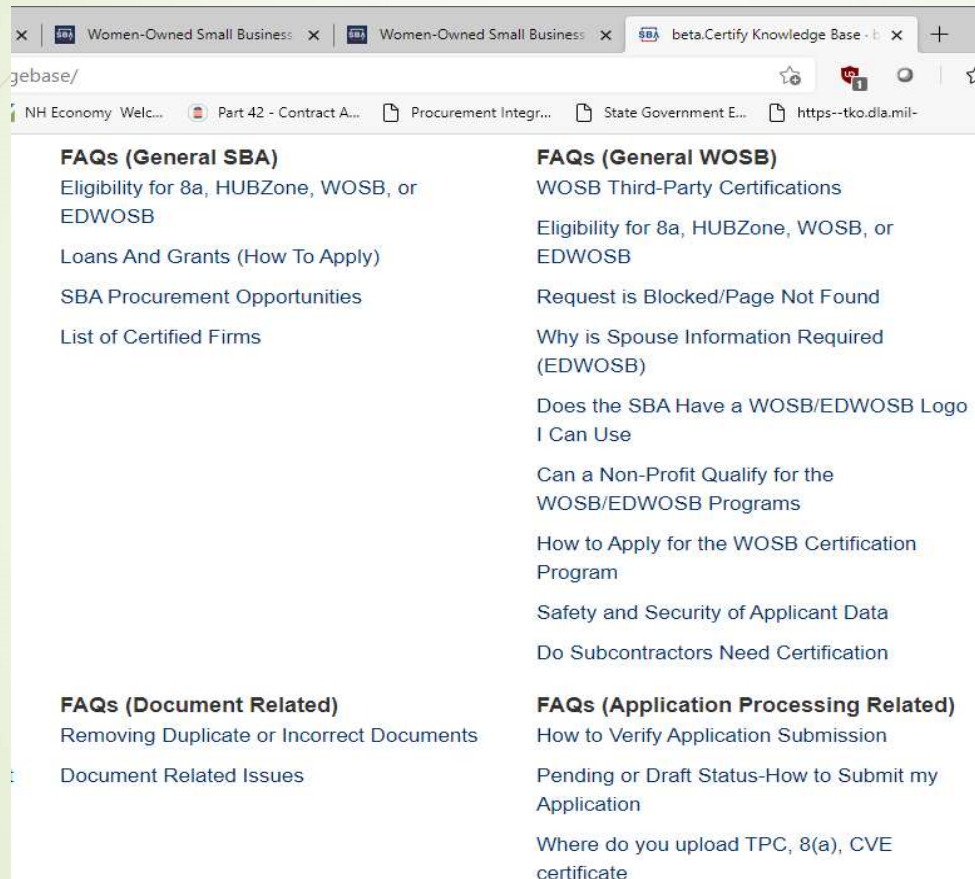
## FAQs

[WOSB Third-Party Certifications](#)

[WOSB/EDWOSB Certify External FAQs](#)



# Knowledgebase FAQs



gebase/

NH Economy Welc... Part 42 - Contract A... Procurement Integr... State Government E... https--tko.dla.mil-

<b>FAQs (General SBA)</b> <ul style="list-style-type: none"><li>Eligibility for 8a, HUBZone, WOSB, or EDWOSB</li><li>Loans And Grants (How To Apply)</li><li>SBA Procurement Opportunities</li><li>List of Certified Firms</li></ul>	<b>FAQs (General WOSB)</b> <ul style="list-style-type: none"><li>WOSB Third-Party Certifications</li><li>Eligibility for 8a, HUBZone, WOSB, or EDWOSB</li><li>Request is Blocked/Page Not Found</li><li>Why is Spouse Information Required (EDWOSB)</li><li>Does the SBA Have a WOSB/EDWOSB Logo I Can Use</li><li>Can a Non-Profit Qualify for the WOSB/EDWOSB Programs</li><li>How to Apply for the WOSB Certification Program</li><li>Safety and Security of Applicant Data</li><li>Do Subcontractors Need Certification</li></ul>
<b>FAQs (Document Related)</b> <ul style="list-style-type: none"><li>Removing Duplicate or Incorrect Documents</li><li>Document Related Issues</li></ul>	<b>FAQs (Application Processing Related)</b> <ul style="list-style-type: none"><li>How to Verify Application Submission</li><li>Pending or Draft Status-How to Submit my Application</li><li>Where do you upload TPC, 8(a), CVE certificate</li></ul>



## User Guide “Cheat Sheet”

-an abridged table of contents.

- Create your Account, Claim Your Business and Log in – Pages 4 - 12
- Eligibility – Pages 13 -16
- Delegates – Pages 16 - 17
- Document Ownership by Women – Pages 18 - 24
- Prior Certifications (8(a), TPC, CVE) – Pages 25 - 28
- Ownership Control – Pages 28 - 30
- Economic Disadvantage – Pages 30 - 53
- Invitees/Individual Contributors – Pages 53 - 57
- Attestation and Submission – Pages 57 - 60
- Messages and Profile – Pages 60 - 63
- Help – Pages 63 - 64
- Request for Information and Deficiency Letters – Pages 65 - 67



## Shameless Commercial:

- ▶ NH PTAC offers free assistance with all this & more.
- ▶ You must have a physical presence in New Hampshire.
- ▶ You have to sign up online.
- ▶ To continue “active client” status, you have to use us as a resource
- ▶ Please login to [eCenter](#) periodically to update your information and complete any pending surveys!

# How do I get started with NH PTAC?

- Go to the website and answer our questionnaire ([www.nheconomy.com/ptac](http://www.nheconomy.com/ptac))
- email us at: [govcontracting@livefree.nh.gov](mailto:govcontracting@livefree.nh.gov)
- Meet with us in Concord (currently via Zoom)
- Request a site visit – we'll come to you.

