

PTAC's Quick Guide to Federal Certifications




Part 1: Benefits & Eligibility Criteria

Certification processed by	<p align="center"> Yourself &  Self-certifications via the System for Award Management </p>					 U.S. Dept of Veterans Affairs		
Certification	SB Small Business	SDB Small Disadvantaged Business	SDVOSB Service-Disabled Veteran Owned SB	WOSB Woman Owned Small Business	EDWOSB Economically Disadvantaged WOSB	CVE Verification Verification of veteran and service-disabled veteran status by the Center for Verification and Evaluation (CVE).	HUBZone Historically Underutilized Business Zone	8(a) Nine Year Business Development Program
Goals	23%	5%	3%	5%	Included in WOSB goal of 5%	3%	3%	Included in SDB goal of 5%.
Benefits	Upon completion of your SAM registration and self-certifications, you will be eligible to bid on contracts set aside for small businesses. While completing your SAM registration, click on the link to complete your SBA Profile, so that government customers and prime contractors can find you and verify your status in the DSBS, Dynamic Small Business Search.					Prioritizes SDVOSBs and WOSBs for contracts awarded by the Veterans Administration. Required for bidding on SDVOSB and VOB set-asides with the V.A.	Sole source & set-aside contracts, 10% price evaluation preference in competitive bids.	Sole source & set-aside contracts, mentoring, business development assistance.
Important Criteria Note: not all criteria are listed here. To learn more, see Part 2 Application Process,	Business must be independently owned and operated, and cannot be affiliated with a non-small business.	51% owned & controlled by socially & economically disadvantaged individual/s, as defined in SBA's 8(a) program.	51% owned & controlled by service-disabled veteran/s, must be fulltime, have unconditional control & management of biz, be highest paid owner, highest-ranking officer.	Be a small business. At least 51% owned and controlled by one or more women who are U.S. citizens, must manage day-to-day operations and make long-term decisions, be the highest paid owner & highest-ranking officer. WOSB and EDWOSB set-aside contracts are restricted to designated NAICS: https://www.sba.gov/document/support-qualifying-naics-women-owned-small-business-federal-contracting-program		51% owned & controlled by veteran/s or service disabled veteran/s and must be fulltime, have unconditional control & management of biz, be highest paid owner and highest-ranking officer.	Must be a small business. Min 51% of owner/s must be U.S. citizens. Principal place of business must be in a HUBZone, at least 35% of employees must live in a HUBZone. Employees must work min. of 40 hrs/month. Search your address here: https://maps.certify.sba.gov/hubzone/map#center=39.828200,-98.579500&zoom=5	Must be a small business. Min. 2 yrs in operation. Be at least 51% owned & controlled by U.S. citizens who are socially & economically disadvantaged individuals. Women & non-minorities must prove individual social disadvantage
Not to exceed \$ thresholds for financial criteria Read regulations for details and exceptions.	For each NAICS code, must be small by SBA standards: http://www.sba.gov/document/support-table-size-standards	\$750K personal net worth, excluding equity in home & business. This self-cert is for subcontracting only, not for prime contracts.	n/a	n/a	\$750K personal net worth, excluding equity in IRA, home & business; \$350K personal adj. gross income; \$6 million personal assets.		n/a	To enter program: \$250K personal net worth, \$250K adjusted personal gross income, \$4 million personal assets. PNW excludes equity in IRA, home & business.
Look for competitors	Search the Dynamic Small Business Search (DSBS): https://web.sba.gov/pro-net/search/dsp_dsbs.cfm					https://www.va.gov/osdbu/verification/	https://web.sba.gov/pro-net/search/dsp_dsbs.cfm	

PTAC's Quick Guide to Federal Certifications

Part 2: Application Process --no fees are charged to obtain these certifications.

Updated August 2019

Certification processed by	 Yourself & SAM Self-certifications via the System for Award Management					 Dept of Veterans Affairs	 U.S. Small Business Administration	
	Certification	SB	SDB	SDVOSB	WOSB	EDWOSB	CVE Verification	HubZone
Application Process	1. Create an account at https://www.login.gov . Avoid similar sites that charge you a fee 2. Mail a notarized letter to the Federal Service Desk. 3. Check boxes as applicable for SDB, SDVOSB, WOSB, EDWOSB. 4. Click on the SBA icon to complete your SBA Profile. 5. WOSBs & EDWOSBs must also register and upload docs at https://www.certify.sba.gov/					Online w/ docs upload. PTAC Verification Counselors, certified by the Dept. of Veteran Affairs, are available to assist you.	Re-certify every 3 years. No term limits. Online application & docs upload.	Online application and docs upload.
Approximate Timeframe Document scanning & uploading varies with complexity of company	About 1- 2 weeks. Allow 2 to 3 hours to establish your SAM account and answer questions. Complete your letter template in 30 minutes. Print, notarize and mail the letter, allow 1 to 2 weeks for review and approval. Streamline your process by preparing in advance for your SBA Profile: compose an offline 1,000 character Capabilities Narrative, keywords, and past performance data & references. Find your NAICS codes at: https://www.census.gov/eos/www/naics/					2 - 8 hrs. Average processing time is less than 60 days but can be much longer if initial application is unclear or additional information is requested.	Many applicants need several weeks to complete forms, collect & upload documents. SBA SHOULD conduct its review within 90 days of receipt of a COMPLETE application. Incomplete applications and appeals can greatly emend this process.	Online application, upload docs, refer to checklist for required documentation; review time varies depending on complexity of application.
To get started	Obtain a free DUNS number from Dun & Bradstreet at: https://www.dnb.com/duns-number/get-a-duns.html then wait 24-72 hours to start your SAM registration.		WOSB & EDWOSB: You need your MPIN (from SAM), EIN and DUNS to apply at: https://certify.sba.gov/			https://www.va.gov/osdbu/verification/	https://certify.sba.gov/	https://certify.sba.gov/
Look for your company	Search the Dynamic Small Business Search (DSBS): http://dsbs.sba.gov/dsbs/search/dsp_dsbs.cfm Select the link that says "SBA - Could not set session cookies."					https://www.va.gov/osdbu/verification/	https://web.sba.gov/pro-net/search/dsp_dsbs.cfm	
Renewal requirements	Renew annually. WOSBs and EDWOSBs must upload updated documents with their annual renewals. Updates to your physical address or company name, must be initiated at: https://www.dnb.com/duns-number/get-a-duns.html					Renewal required every three years.	Annual updates, no term limit.	Annual updates, 9 yr term limit.

Small businesses located in San Diego, Orange, Imperial County may be eligible for free assistance on certifications and other requirements for winning local, state and federal contracts and subcontracts. Apply at socalptac.org