

Accessing the PPP Portal: Borrower Procedures

<https://cwcarolina.venturesgo.com/portal/borrowerapplication/>

You will be presented with two options:

- **Start New Application;** or
- **Continue Application**



Paycheck Protection Program Application

Start your application for a small business relief loan under the CARES Act today!

Paycheck Protection Program loans are intended to help small businesses keep their workers employed during the COVID-19 emergency. Loans are provided with no fees, a 5 year term, and an interest rate of 1.0%. Additionally, the program features loan forgiveness based on employee/wage retention over a 24-week period.

To start a new application click Start New Application. If you have already started an application click continue Application.

Deadline to start an application is August 5, 2020.

Start New Application

Continue Application

Accessing the PPP Portal: Borrower Procedures

★ New Application

New Paycheck Protection Program Application

Please start by providing an email address. We will email you a link to your application so you can continue filling it out.

Email *

Send Email

★ Continue Application

New Paycheck Protection Program Application

Please start by providing an email address. We will email you a link to your application so you can continue filling it out.

Email *

Send Email

Either selection will ask for your email address and you will then receive an email to continue to the next step

Accessing the PPP Portal: Borrower Procedures

New Paycheck Protection Program Application

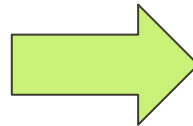
Please start by providing an email address. We will email you a link to your application so you can continue filling it out.

✓ Email sent to **bvarga+11@venturesgo.com**.

In order to continue with the application process **please check your email**. You will receive an email from notifications@venturesgo.com with a link to your application.



You will receive an email from notifications@venturesgo.com that will contain a link to return to the online app



notifications@venturesgo.com

to me ▾

[Click here to continue editing your application.](#)

OR paste the following URL into a web browser:

<https://staging.venturesxtest.com/Portal/BorrowerApplication/Apply?gu>

Accessing the PPP Portal: Borrower Procedures

After clicking on the link, you will be asked if you have an existing funded loan with CommunityWorks

Do you already have an existing funded loan with us?

No Yes



In order to lookup your existing loan we need you to provide specific information. If you wish to continue

Loan # *

SSN *

Lookup Loan Start New

If Yes, please provide **Loan Number** and **SSN** to link the application to the existing loan:

1. **Loan Number** = Needs to match a Ventures Loan Number or Log Number
2. **SSN** = Needs to match SSN of any one owner in the Primary Operating Company from existing loan

If No, it will take you directly to application

Accessing the PPP Portal: Borrower Procedures

Please complete each tab making sure anything with an * is completed.

The data will **auto-save** as you enter the information.

If you linked existing loan to application, some information will automatically **pre-populate** but can be edited.

The screenshot displays the 'General Information' tab of a web form. The form is titled 'Please provide your contact information' and contains several input fields. The 'First Name' and 'Last Name' fields are pre-populated with 'First Name' and 'Last Name' respectively. The 'Email' field is pre-populated with 'bvarga+hint@venturesgo.com'. The 'Phone' field is pre-populated with 'Phone'. Below this, the form is titled 'Tell us about your business' and contains fields for 'Business Name', 'DBA', 'Tax ID', 'Tax ID Type', 'Business Established', 'NAICS Code', and 'Street'. The 'Business Name' field is pre-populated with 'Business Name'. The 'DBA' field is pre-populated with 'Doing Business As'. The 'Tax ID' field is pre-populated with 'EIN or SSN or SBA Issued'. The 'Tax ID Type' field is a dropdown menu with '- Not Set -' selected. The 'Business Established' field is pre-populated with 'MM/DD/YYYY' and has a calendar icon. The 'NAICS Code' field is a dropdown menu with '- Not Set -' selected. The 'Street' field is pre-populated with 'Street'. The form is outlined in orange.

General Information | Loan Details | Job Details & Tax Returns | Demographics | Owner 1 | Owner 2 | Owner 3 | Owner 4 | Owner 5 | Finish Application

Please provide your contact information

First Name * | Last Name *

First Name | *Last Name*

Email | Phone *

bvarga+hint@venturesgo.com | *Phone*

Tell us about your business

Business Name *

Business Name

DBA

Doing Business As

Tax ID * | Tax ID Type

EIN or SSN or SBA Issued | - Not Set -

Business Established * | NAICS Code ⓘ

MM/DD/YYYY | - Not Set -

Street *

Street

Accessing the PPP Portal: Borrower Procedures

- ★ It is recommended that you complete all fields (even ones without *) for faster processing time once application is submitted

The image shows a screenshot of a web form for PPP Borrower Procedures. The form is enclosed in a red border. Several fields are highlighted with red boxes: 'Tax ID *', 'Tax ID Type', 'Business Established *', 'NAICS Code', 'Franchise, if applicable', and 'Do you have a current or prior Small Business Administration (SBA) loan?'. A green box highlights the 'NAICS Code' field, which contains a question mark icon. A green arrow points from this icon to a 'HELPFUL TIP' box. The 'HELPFUL TIP' box contains the text: 'Borrower can click on the question mark and be directed to <https://www.census.gov/eos/www/naics/> for assistance'. The form fields include: 'Tax ID *' (text input with placeholder 'EIN or SSN or SBA Issued'), 'Business Established *' (date input with placeholder 'MM/DD/YYYY'), 'Street *' (text input with placeholder 'Street'), 'City *' (text input with placeholder 'City'), 'State *' (dropdown menu with '- Not Set -'), 'Zip *' (text input with placeholder '00000-0000'), 'Business Entity Type *' (dropdown menu with 'Sole Proprietorship'), 'Business Phone *' (text input with placeholder 'Phone'), 'Franchise, if applicable' (text input with placeholder 'If your business is a franchise, enter name'), and 'Do you have a current or prior Small Business Administration (SBA) loan?' (radio buttons for 'Yes' and 'No').

Tax ID *
EIN or SSN or SBA Issued

Business Established *
MM/DD/YYYY

Street *
Street

City * **State ***
City - Not Set -

Zip *
00000-0000

Business Entity Type * **Business Phone ***
Sole Proprietorship *Phone*

Franchise, if applicable
If your business is a franchise, enter name

Do you have a current or prior Small Business Administration (SBA) loan?
 Yes No

Tax ID Type
- Not Set -

NAICS Code
- Not Set -

HELPFUL TIP
Borrower can click on the question mark and be directed to <https://www.census.gov/eos/www/naics/> for assistance

Accessing the PPP Portal: Borrower Procedures

General Information | **Loan Details** | Job Details & Tax Returns | Demographics | Owner 1 | Owner 2 | Owner 3 | Owner 4 | Owner 5 | Finish Application

Loan Application

Upload signed SBA Form 2483. [Click here to download the Paycheck Protection Application.](#) Only one application is required.

Completed Application

Name ↑	Description	Size KB
No records found.		

Select File

Loan Amount

[Click here to download an Excel calculator to help calculate loan amount.](#)

Completed Calculator

Name ↑	Description	Size KB
No records found.		

Select File

Certification
I certify the information contained in the completed Loan Calculator regarding employee counts and compensation is true and correct.

Average Monthly Payroll* X 2.5

+ EIDL Amount
Amount from current Economic Injury Disaster Loan Program.

Total Loan Amount *

*Amounts for independent contractors can not be used when determining loan forgiveness.
*Must exclude compensation that is in excess of \$100,000 annually for any employee, owner, etc.
*Only employees whose principal place of residence is in the United States may be included.

** Save the application and upload it here.

** Please upload both calculation sheets.

** It is recommended that you start here with the calculation to determine the payroll and loan amount needed on the application. Please refer to the loan calculation form in the initial email to calculate your payroll costs.

Loan Application

The borrower will need to download and complete the Paycheck Protection Program Application by clicking on the link. This document then needs to be uploaded through the **Select File** button. This unexecuted document will also be available once application is converted to a loan within Ventures and it will have the entered information on the top half of the first page of the application prepopulated.

Loan Amount - use the attached calculator to determine the payroll figures needed for the calculation.

Borrower may download the Excel calculator to assist in calculating their average monthly payroll. Once the amount has been calculated they will then enter into the Average Monthly Payroll field and can upload their excel calculations for Lender to view. They will need to Certify their calculations by checking off the **Certification** box.

Accessing the PPP Portal: Borrower Procedures

General Information Loan Details **Job Details & Tax Returns** Demographics Owner 1 Owner 2 Owner 3 Owner 4 Owner 5 Finish Application

Number of full-time equivalent employees.

Current # of Employees

Employees Last Year

Number of employees this time last year.

- Upload quarterly tax filings (form 941) for 2019
- Upload supporting payroll processor records for 2019 and through 02/15/2020
- Independent Contractors: Upload Form 1040 Schedule C and 1099-MISC
- Sole Proprietorship: Upload Form 1040 Schedule C

Tax Filings

Name ↑	Description	Size KB
No records found.		

Select Files

< Previous Next >

Upload the documents you used in your loan calculations. Upload your Schedule C if you are a sole proprietor or single member LLC. If you have W-2 employees, please upload the 941s for each quarter for 2019. See instructions above.

Accessing the PPP Portal: Borrower Procedures

General Information | Loan Details | Job Details & Tax Returns | Demographics | **Owner 1** | Owner 2 | Owner 3 | Owner 4 | Owner 5 | Finish Application

Please enter information for each owner of 20% or more.

First Name * Last Name *

Ownership % * Job Title *

Citizenship Status SSN *

Phone

Street

City State

Zip

Upload a copy of this owners drivers license.

Drivers License

An owner tab will need to be completed for anyone owning 20% or more of the borrowing entity. Complete all the required fields and upload a copy of the driver's license for each.

Accessing the PPP Portal: Borrower Procedures

General Information Loan Details Job Details & Tax Returns Demographics Owner 1 Owner 2 Owner 3 Owner 4 Owner 5 **Finish Application**

Comments

Once you have completed all required information and uploaded signed documentation, press "Submit my Application" below to finish the application process. If you would like to finish your application later, press "Finish Later".

Submit my Application **Finish Later**

If any comments are needed, please add them to the **Comments** box. If you need to save the application and complete it later, you can click **Finish Later button**.

If you are ready to submit the application, then Click **Submit My Application**. Once successfully submitted, you will receive a message that submission was successful and will be contacted by the Lender.

Submission Complete!

We will be contacting you regarding your application.

Borrower FAQ's

- ★ **I am having trouble accessing the application/ I am not being allowed to upload documents/ Some fields are not letting me type in data -** Please use Chrome as your browser when filling out the application.
- ★ **How do I delete an upload?** You can delete an upload by clicking on the X next to your uploaded file.
- ★ **How do I correct or add information once my application is submitted?** Once an application is submitted, you cannot make any corrections to it. You will need to contact the Lender.
- ★ **I received an Error Code, what do I do?** Send the error with message to Lender. If possible, send a screenshot as well.