

PPP3 Portal: Applicant Application Procedure

(PAYCHECK PROTECTION PROGRAM – FIRST DRAW AND SECOND DRAW)

Accessing the PPP Portal: Applicant Procedures

The Applicant will be presented with two options*:

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

YOUR LOGO HERE

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 businesses keep their workers employed during the COVID-19 emergency. Loans are provided with favorable terms and are fully forgivable if conditions are met. Additionally for this round, previous PPP borrowers may qualify for a second PPP loan in some circumstances.

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

Start New Application

Continue Application

**Please use CHROME for a better navigation experience*

Accessing the PPP Portal: Applicant 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 the applicant's email address and they will then receive an email to continue to the next step

Accessing the PPP Portal: Applicant Procedures

New Paycheck Protection Program Application

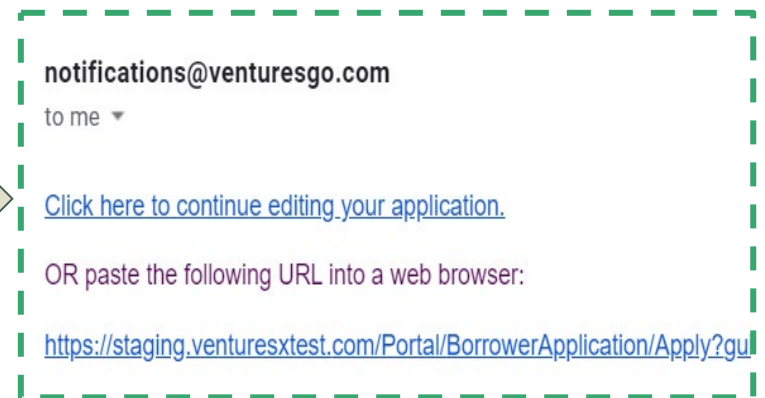
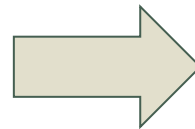
Please start by providing an email address. We will email you a link to your application so you can continue filling it out.

Email *

Send Email



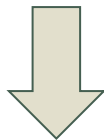
The Applicant will receive an email from notifications@venturesgo.com that will contain a link for them return to the online app



Accessing the PPP Portal: Applicant Procedures

After clicking on the link, Applicant will be asked if they have an existing funded loan with company.

Do you already have an existing funded loan with us?



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

Loan # *

SSN *

If **Yes**, they will be asked to provide **Loan Number** and **SSN** to link the application to the existing loan:

1. **Loan Number** = Needs to match a 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 them directly to application

Accessing the PPP Portal: Applicant Procedures

General tab

- The applicant will complete each tab making sure anything with an * is completed.
- The data will **auto-save** as they enter the information.
- If Second Draw PPP loan is Yes then a new tab will appear for applicant to complete
- If applicant linked existing loan to application within lender's Venture's site, some information may automatically **pre-populate** and can be edited by applicant

Complete Your Paycheck Protection Program Application

Welcome to your application! Please fill in all required fields and upload the requested documentation. Your application data is saved automatically as you proceed through the form. You can leave this page and return later and your information will be retained. When you are done click **Submit my Application** on the Finish Application tab. Saved January 19, 2021 7:04 PM

Thank you for your Paycheck Protection Program(PPP) loan application.

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

Please provide your contact information

First Name * Last Name *
Email Phone *

Tell us about your business

General

Is this a second draw PPP loan?
 Yes No

Business Name *

DBA

Tax ID Type Tax ID *
- Not Set - EIN or SSN
Enter EIN as XX-XXXXXXX or SSN as XX-XX-XXXX

Business Established * NAICS Code
MM/DD/YYYY - Not Set -

Business Entity Type * Business Phone *
Sole Proprietorship Phone

Size Standard *

- Not Set -

Business Address

Street *

City * State *

Zip *

Franchise, if applicable

If your business is a franchise, enter name

Loan Purpose (Check All That Apply)

You must check at least one.

Payroll Costs Rent/Mortgage Interest
 Utilities Covered Operations Expenditures
 Covered Property Damage Covered Supplier Costs
 Covered Worker Protection Expenditures
 Other

Other Explain

Next >

Accessing the PPP Portal: Applicant Procedures

This tab will only appear if applicant has selected a **Yes** within the **General** tab for **Is this a second draw PPP Loan?**

Applicant should complete the information within the tab for lender to review.

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

First Draw SBA PPP Loan

| | |
|--|---|
| Loan Number | Loan Amount |
| <input type="text"/> | <input type="text"/> |
| Comparison Time Period | 2020 Gross Receipts |
| <input type="text" value="- Not Set -"/> | <input type="text"/> |
| | <small>This should be 25% less than the corresponding Quarter revenue below</small> |
| Comparison Time Period | Gross Receipts |
| <input type="text" value="- Not Set -"/> | <input type="text"/> |

Accessing the PPP Portal: Applicant Procedures

Loan Details tab

Loan Application

The applicant will need to download, complete, and upload the Paycheck Protection Program Application by clicking on the link. The link will adjust to the correct form based on whether applicant selected Yes to ***Is this a Second Draw PPP loan*** within the General tab.

Loan Amount

Applicant may download the Excel calculator to assist in calculating their average monthly payroll. Once the amount has been calculated applicant will then enter the Average Monthly Payroll field and can upload their excel calculations for Lender to view. EIDL data is to be entered only if applicable. Applicant will need to Certify their calculations by checking off the Certification box.

Certification

A loan cannot be submitted to lender until the applicant Certification box is checked

General **Loan Details** Job Details & Tax Returns 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 Program 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
\$0.00 \$0.00

EIDL information required for 1st draw PPP loans ONLY.

EIDL (Do not include any EIDL Advance) EIDL Loan Number
Amount from current Economic Injury Disaster Loan Program.

Total Loan Amount *
For 2nd draw loans, this amount cannot exceed 2 million dollars.

< Previous Next >

Accessing the PPP Portal: Applicant Procedures

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

Current # of Employees
0
Number of full-time equivalent employees.

Employees Last Year
0
Number of employees this year last year.

- Upload quarterly tax filings (form 941) for 2020
- Upload supporting payroll processor records for 2020 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 >

Applicant completes job information and uploads applicable/requested tax filings to support loan amount request.

NOTE: No need to provide data for **Employees Last Year**

Accessing the PPP Portal: Applicant Procedures

Owner(s) tab(s)

- The fields that have red asterisk need to be complete;
- Email is not mandatory but *should be completed*;
- Owner addresses are not mandatory but *should be completed*
- Driver's license should be uploaded for each owner for lender to verify identities

General Loan Details Job Details & Tax Returns **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 *
First Name Last Name

Ownership % * Job Title *
0.0000 % - Not Set -

SSN *
000-00-0000

Phone Email
Phone name@company.com
Only the Primary Owner needs an email.

Street
Street

City State
City - Not Set -

Zip
00000-0000

Demographics

Gender Veteran
- Not Set - - Not Set -

Race Ethnicity
- Not Set - - Not Set -

Upload a copy of this owners drivers license.

Drivers License

| Name ↑ | Description | Size KB |
|-------------------|-------------|---------|
| No records found. | | |

Select File

< Previous Next >

Accessing the PPP Portal: Applicant Procedures

Complete Your Paycheck Protection Program Application

Welcome to your application! Please fill in all required fields and upload the requested documentation. When you are done click **Submit my Application** on the Finish Application tab.

General Information Loan Details Job Details & Tax Returns 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, Applicant can add them to the **Comments** box. If Applicant needs to save application and complete later, they can click **Finish Later button**.

If ready to submit application, then Click **Submit My Application**. Once successfully submitted, the Applicant will receive a message that submission was successful.

Submission Complete!

We will be contacting you regarding your application.

Applicant 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?** Click on the X next to the uploaded document. Alternatively, you can upload the corrected document and add a comment to the Comment field in **Finish Application Tab**.
- ★ **How do I correct or add information once my application is submitted?** Once an application is submitted, *you cannot make any corrections/edits to it*. You will need to contact the Lender.
- ★ **I received an Error Code, what do I do?** If you're using **Chrome** and you received the error send the error with message to Lender. If possible, send a screenshot as well.
- ★ **I received an email from notifications@venturesgo.com. Is that who I contact with questions?** No. Do not contact Ventures. They're a software technology company we're using to assist in gathering your data.

Questions?

Please contact your lender directly if you encounter any issues in your PPP3 submission.