

PPP FORGIVENESS CHEAT SHEET

A STEP-BY-STEP GUIDE FOR COMPLETING YOUR APPLICATION

Access the PPP loan forgiveness portal and attach all required documents to the allotted placeholders as indicated below.

Important to note, if it has been more than 20 days since you last logged into the system, please contact the PPP forgiveness team at pppforgiveness@banksocal.com to have your sign on reset.

THE PROCESS

- APPLICATION
- NEXT STEPS

Your Loan Forgiveness Application

The first step of your application is complete. We now need to move on to uploading supporting documents.

1. Please click the Go to Dashboard button to upload the your supporting documentation in the Upload Documents section of the "TO-DO-LIST".
2. Once you've uploaded all required documentation, we will begin processing your Forgiveness Application. Failure to upload required documentation may delay the processing of your Forgiveness Application.
3. It may take several weeks to process your Forgiveness Applications. We will contact you if we need additional information or documentation.

[Go to Dashboard](#)

If you were not ready to provide documents at that time and had come back at a later time to provide documents, please follow the instructions below:

1. Check the status of your loan. If it is in Review, then you have successfully finished entering and submitting the data and must provide your supporting documents.

YOUR PRODUCTS

SBA 7(a) - Paycheck Protection P... >

Review Accepted Submitted to SBA Completed

2. Click on Upload Documents

✓ TO-DO LIST





Upload Documents

16





3. You will be presented with a list of document placeholders. You are not required to place a document into every placeholder. Only provide documents to support the expenses you have claimed.


✓ TO-DO LIST

 Upload Documents 16 


Social Security Card


 

You do not need to provide a copy of your SSN card as part of the Forgiveness application. You will be notified by your banker if required.



DRAG & DROP
or browse


Health Benefits Information

 SBA 7(a) - Paycheck Protection Program
(\$683400.00)



DRAG & DROP
or browse

Mortgage Interest Information

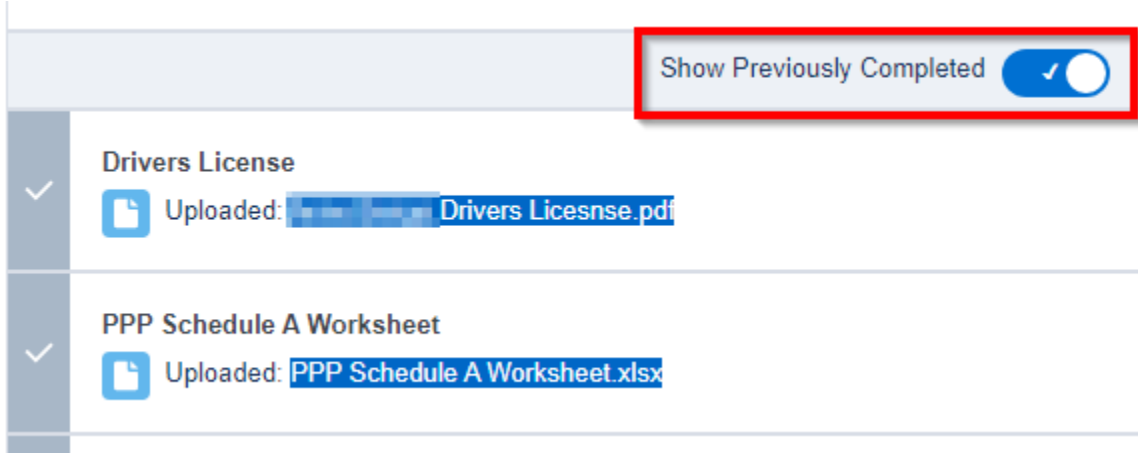
 SBA 7(a) - Paycheck Protection Program
(\$683400.00)


DRAG & DROP
or browse

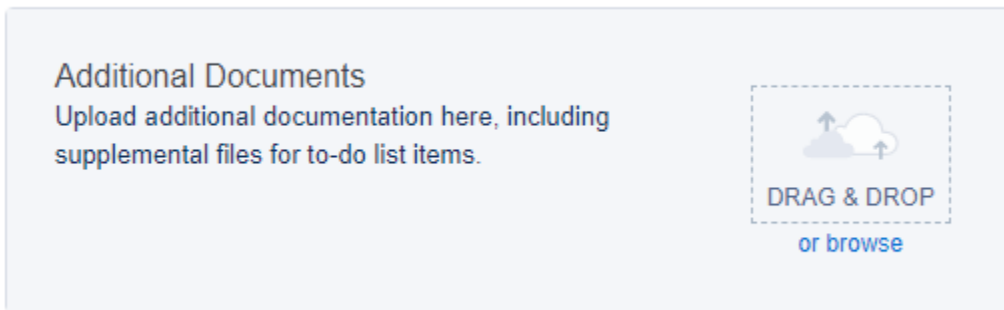
Rent or Lease Information 1



4. In order to view documents already submitted, scroll down to the bottom of the screen and click on the Show Previously Completed button.



5. Please only use the Additional Documents option if you've exhausted all available placeholders



Once you have provided your documents, your application will be flagged as complete and will be reviewed by one of our underwriters. If the underwriter determines that you must provide additional information, you will be contacted by email or phone. It is not necessary to follow up.