Steps To Complete Forgiveness Application:

1. **Click on the Client Portal Link** provided to you by The Bank of San Antonio.

2. **Create a PIN** that you will need to use in the future to access your forgiveness application.

   a. This pin will need to be between 6-12 characters. It can include numbers, letters, and special characters.

3. ⑦ **HINT:** If you would like to find more information about any fields in the app, utilize the tool tip icon by clicking directly on the available question mark icon beside the corresponding field.

4. **Click "CHECK YOUR EZ FORM ELIGIBILITY"** (Optional)

   a. Check the box beside any of the eligibility options that correspond to your application.

   b. Click Save and Close.

   c. In the Checkbox beside Use EZ Form: check the box next to Yes (if eligible). This will adjust the form.

5. **Complete the Business Information Section**

   a. Verify the information in the shaded fields. If anything needs to be corrected, contact The Bank of San Antonio to update.

   b. Select Yes or No if you would like to provide demographic information about your principals (voluntary).

      i. If Yes is selected, a new section will open that will allow you to identify for each principal.

   c. Under Employment Information answer the required fields.

   d. If the loan was disbursed before 6/5, chose which duration you would like to use for your cover period (8 weeks or 24 weeks). Loans disbursed after 6/5 will default to 24 weeks.

e. In the Payroll Information section select the frequency with which payroll is paid to employees.

f. Select Yes or No if you are using an Alternative Payroll Covered Period.

   i. If Yes is selected, enter the day of the first pay period following the PPP Loan Disbursement Date on the page that appears.

6. **Complete the Loan Information Section**

   a. Enter relevant EIDL information.

   b. Check box next to "Check if Borrower (together with affiliates, if applicable) received PPP Loans in excess of 2 Million" (if applicable).

7. **Complete Employee Compensation** (3508EZ Only)

   a. Enter relevant employee compensation information.

   b. Upload documents.

      i. Click the upload documents button.

      ii. Check the boxes beside the related field you would like to connect each document to.

      iii. Drag and drop file or click to upload.

      iv. Click upload at the bottom of the page.

      v. Repeat this process for each document.

8. **Complete Schedule A** (3508 Only)

   a. Option (1) Download the Excel worksheet.

   b. Fill out and upload Excel worksheet based using instructions provided on worksheet.

   c. Option (2) If calculations have already been made, numbers can be plugged directly into the corresponding fields without the need for the excel sheet.

   d. Upload documents.

      i. Click the upload documents button.

      ii. Check the boxes beside the related field you would like to connect each document to.

      iii. Drag and drop file or click to upload.

      iv. Click upload at the bottom of the page.

      v. Repeat this process for each document.

9. **Complete Owner Compensation Section** (if Applicable)

    a. Enter 2019 and Amount Paid.

    b. Click the upload documents button if applicable.

10. **Complete the FTE Reductions Section** (3508 Only)

    a. Review information uploaded from the Schedule A worksheet.

    b. Upload relevant documents.

11. **Complete Nonpayroll Costs Section**

    a. Enter any relevant nonpayroll line items in the table.

    b. Upload any relevant documentation by clicking the upload documents button.

12. **Review Calculate Forgiveness Section**

13. **Submit**

    a. Select an Authorized representative of Borrower.

    b. Select from individuals related to the application on the related people tab.

    c. Use the create new person tab to add an authorized signer that is not already related to the relationship through an application.

    d. Verify or enter the email of the authorized signer in the email box.

    e. After information is verified hit the Submit or Submit and (if applicable) Send Email for Esignature button, hit Confirm and Send for Esignature.

    f. If prompted, review and complete any of the missing required fields.

14. **Esign 3508 document** through received signature request email.