



PPP Loan Application Portal Guide

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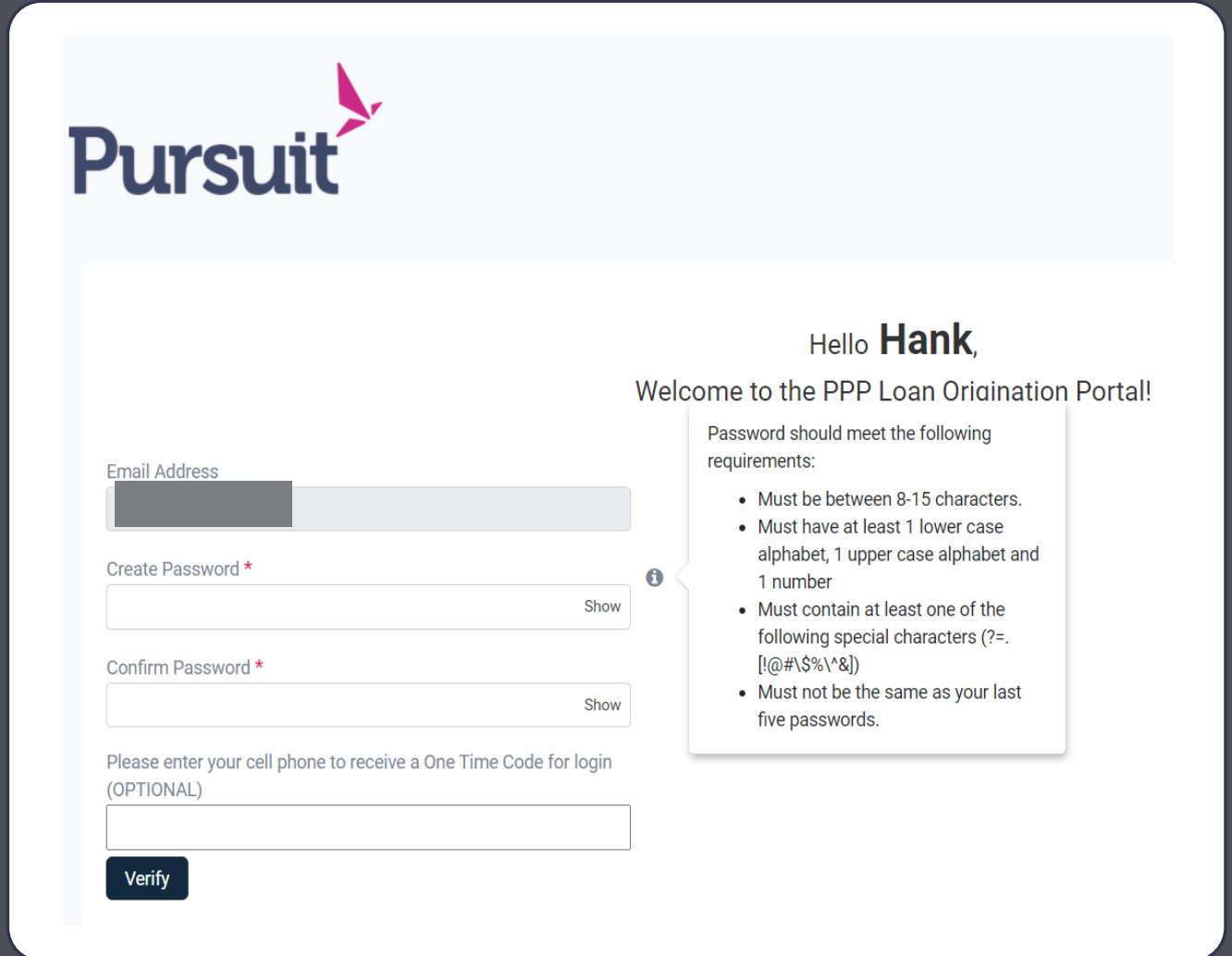
- This guide will walk you through Pursuit's PPP application portal. It includes screen shots of each page and provides instructions of key fields.
- Please review the procedures and requirements for PPP before you begin the application process. Providing complete and appropriate documentation will make the application process more efficient.
- As a reminder, the calculation of the requested loan amount and supplying proper supporting information is your responsibility as the applicant.

Portal Registration

- Registration email will be sent from no-reply@pursuitlending.com with the subject line “PPP Loan Origination User Registration.”
- Included in the email will be a registration link which will take you to the portal.
- You will then create your password for the portal. You can also enter your cell phone number to receive a one-time code for login. Otherwise, you will receive the access code via email.

Portal Registration

- Registration email will be sent from no-reply@pursuitlending.com with the subject line “PPP Loan Origination User Registration.”
- Included in the email will be a registration link which will take you to the portal.
- You will then create your password for the portal.
- You will need an access code to log into the application. You can enter your cell phone number here to receive a one-time code for login. Otherwise, you will receive the access code via email.



The screenshot shows the Pursuit portal registration interface. At the top left is the Pursuit logo. The main heading reads "Hello **Hank**, Welcome to the PPP Loan Origination Portal!". Below this is a registration form with the following fields: "Email Address" (with a masked input), "Create Password *" (with a "Show" link), "Confirm Password *" (with a "Show" link), and "Please enter your cell phone to receive a One Time Code for login (OPTIONAL)" (with a text input). A "Verify" button is at the bottom of the form. To the right of the form is a callout box titled "Password should meet the following requirements:" containing a bulleted list of password rules.

Pursuit

Hello **Hank**,
Welcome to the PPP Loan Origination Portal!

Email Address

Create Password *

Confirm Password *

Please enter your cell phone to receive a One Time Code for login (OPTIONAL)

Verify

Password should meet the following requirements:

- Must be between 8-15 characters.
- Must have at least 1 lower case alphabet, 1 upper case alphabet and 1 number
- Must contain at least one of the following special characters (?=, [!@#%\$%^&])
- Must not be the same as your last five passwords.

USER AGREEMENT TERMS & CONDITIONS OF USE

1. INTRODUCTION

1.1 Contract

You agree that by clicking "Sign Up" or similar, registering, accessing or using our services (described below), you are agreeing to enter into a legally binding contract with PCFS Solutions, a California corporation ("PCFS") (even if you are using our Services on behalf of a company). If you do not agree to this contract ("Contract" or "User Agreement"), do not click "Sign Up" (or similar) and do not access or otherwise use any of our Services.

When you use our Services, you agree to all of these terms. Your use of our Services is also subject to our [PRIVACY POLICY](#), which covers how we collect, use, share, and store your personal information.

PCFS is an authorized agent and service provider of your SBA Lender to provide you, the Borrower, the Borrower Portal at www.PPPOrigination.com and other PCFS-related sites, communications and other services that state that they are offered under this Contract for purposes of relaying certain information inputted by you to your SBA lender and its affiliates and subsidiaries it controls (collectively "SBA Lender") via a second portal ("Lender Portal") as may be required for applying for a Paycheck Protection Program Loan ("Services"). Registered users of our Services are "Users" and unregistered users are "Visitors".

As a Visitor or User of our Services, the collection, use and sharing of your personal data is subject to this [PRIVACY POLICY](#) (including other documents referenced in this Privacy Policy) and updates.

As a User of our Services, you authorize and direct us to provide your SBA Lender (with whom we contract as a service provider) all information inputted by you on the Borrower Portal as is necessary for PCFS to perform the Services.

1.2 Users and Visitors

When you become a registered user on www.PPPOrigination.com, you become a User. If you have chosen not to register for our Services, you may access certain features as a "Visitor."

1.3 Change

☐ I Agree to the Terms of Use and [Privacy Policy](#)

Cancel

Register

Portal Registration

Please review the Terms and Conditions and agree by selecting the checkbox at the bottom of the page.

Click 'Register' to complete your registration to the portal. You will receive an email confirming your registration.

Portal Login

Once you have registered, login to the portal with the username and password you created.

Upon entering your username and password, you will need to enter the One-Time Authentication Code that was sent to your email address or your cell phone (if you provided your number in the previous step).



Sign In

Fill in the field below with your Credentials to enter the portal.

[Show](#)[Forgot password](#)


Portal Login

Enter your One-Time Authentication Code to verify your account. This will be sent to your email on file or cell phone if provided.

If you do not receive a code, click on 'Resend OTP' for a new code to be sent.

Once you validate, you will be signed in the portal.

Please enter the One-Time Authentication Code to verify your Account

A One-Time Authentication Code has been sent to your registered email address  or Cell Phone

☐ Remember My Device for 30 Days

[Resend OTP](#)

Validate

✓

eMail Sent to Borrower

✓

Borrower Registered

✓

Needs to be Submitted

✓

More Information Needed

✓

Submitted to Lender

✓

Under review

✓

Submitted to SBA

✓

SBA- eMail Sent to Borrower

✓

Create Forms

Status : eMail Sent to Borrower

InstructionsBusiness InfoPPP DetailsPrincipal DetailsCertify & Submit

Messages

Next

Welcome to the PPP Loan Origination Portal

PPP Origination Portal Overview

- Select whether this is your First or Second PPP Loan Designation.
- Enter your Basic Business Information.
- Fields with a Red (*) are Required Fields.
- Fields that are shaded are Calculated Fields.
- Enter your PPP Loan Details and Upload Supporting Documentation.
- Please Do Not scan all documents together and upload all at once.
- To add a Document:
 - Click on the Upload Link. A browse window will open.
 - Browse out to the file you wish to upload or Drag the Document from a folder into the window provided. Wait for the Document to upload before closing the window.
 - Once the File is uploaded, the Files Link will display how many documents have been uploaded to a Line Number.
 - Click the Files Link to View, Download or Delete a Document.

Instructions

The first page of the origination portal are the Instructions. Please review the instructions and click 'Next' in the upper right corner of the screen. Remember, you do not need to fill out the SBA application form – our application portal will complete the application.

eMail Sent to Borrower

Borrower Registered

Needs to be Submitted

More Information Needed

Submitted to Lender

Under review

Submitted to SBA

SBA- eMail Sent to Borrower

Create Forms

Status : eMail Sent to Borrower

InstructionsBusiness InfoPPP DetailsPrincipal DetailsCertify & Submit

Messages

Save & Continue

Business Information

Have you received a prior PPP Loan?

Yes

No

Use First PPP Loan Calculations

Yes

No

Loan Number : 0009143

Business Name *

Pursuit Test Company Inc.

Business Structure *

-- Select Business Structure --

Is this business a SBA Franchise? *

Yes

No

Doing Business As (DBA) Name

Current Number of Employees *

Franchise Name

Business Establishment Date *

Gross Annual Revenue

Franchise Code

Use Tax Id

Business Tax ID (EIN)

Social Security Number (SSN) ⓘ *

Business Info

The first page of the application is the Business Info tab. Please note that this information may be pre-populated based on your first PPP loan with Pursuit and the information provided as part of your initial application inquiry.

Business Information

Have you received a prior PPP loan?: Answer 'Yes' or 'No'

If the business received a PPP loan in the past, select 'Yes' – you will be applying for a Second Draw PPP Loan.

If this will be the business' first PPP loan, select 'No' – you will be applying for a First Draw PPP Loan.

Optional: Use same calculations as first PPP loan if you wish to apply for the same loan amount and calculation.

Business Information

Business Structure: Choose your business' entity structure. If you need help determining the structure, please review our [Entity Type Summary](#).

Franchise: If your business is a franchise, select 'Yes' here. Please review the [SBA Franchise Directory](#) to see if your franchise is listed. Please provide the Franchise Name and Franchise Code as reported on the Directory.

Doing Business As (DBA Name): If the business operates as something other than the legal entity name, provide the DBA Name (optional).

Business Information

Current Number of Employees: Enter the total number of employees at the time of application. SBA does not separate full-time and part-time employees here. They are looking for the total number.

Business Establishment Date: Enter the date the business was established. If you do not have this in your records, you can likely visit the Department of State where you registered the business.

Gross Annual Revenue: Please enter the annual revenues from the most recent year. This is not related to the SBA application but is for loan reporting purposes. This figure will not impact your loan amount or 25% revenue reduction calculation.

Business Information

Taxpayer Identification Number: This is a key number in the application as it is the primary record indicator used by SBA to approve loans.

If the business has an Employer Identification Number (EIN formatted as XX-XXXXXXX), click the toggle for “Use Tax ID” and input the number. In most circumstances you will apply using the business EIN.

If you are a sole proprietorship, self-employed individual, or independent contractor and do not have an EIN, you may enter your Social Security Number (SSN formatted as XXX-XX-XXXX) here.

Business Address

Street Address 1 *

Street Address 2

City *

State *

Zip Code *

+4 Zip Code

Phone Number *

Save & Continue

Business Information

Add the primary business address to complete this section of the application.

Once complete, select 'Save and Continue' at the bottom right to move on to the next stage.

PPP Details

Before inputting information on this page, we recommend reviewing our website for details on [how to calculate your PPP loan amount](#) and for Second Draw applicants, [how to calculate the 25% revenue reduction](#).

We also have a simple [Excel calculator](#) that can be downloaded to assist in your calculations.

The screenshot shows a web application for PPP loan details. At the top, a progress bar indicates the status: "Needs to be Submitted" (highlighted in green). Below the progress bar, a navigation menu includes "Actions", "Business Info", "PPP Details" (selected), "Principal Details", and "Certify & Submit". A "Messages" button is located on the right. The form is divided into sections: "Basic Information" and "Revenue Reduction".

Basic Information

NAICS Code *	FirstDraw PPP SBA Loan #	FirstDraw PPP Loan Amount
<input type="text"/>	<input type="text"/>	<input type="text" value="\$"/>
Average Monthly Payroll *	Monthly Payroll x 2.5 *	PPP Loan Amount ("Calculated Max cap is 2M Or 10M")
<input type="text" value="\$"/>	<input type="text" value="2.5"/>	<input type="text" value="\$"/>

Revenue Reduction

2020 Reference Quarter	Gross Revenue
<input type="text" value="-- Select Quarter --"/>	<input type="text" value="\$"/>
2019 Reference Quarter	Gross Revenue
<input type="text" value="-- Select Quarter --"/>	<input type="text" value="\$"/>

At the bottom right of the form, there are two buttons: "Previous" and "Save & Continue".

PPP Details

NAICS Code: North American Industry Classification System Code is the specific industry the business operates in. This is a six-digit numeric code.

You can typically find this code on your business tax return (see screenshots for 1040, 1065, and 1120, respectively).

If you cannot find this code on your tax documents, please review the [NAICS website](https://www.naics.com/).

SCHEDULE C
(Form 1040)

Profit or Loss From Business
(Sole Proprietorship)

Department of the Treasury
Internal Revenue Service (99)

OMB No. 1545-0074
2020
Attachment
Sequence No. **09**

Go to www.irs.gov/ScheduleC for instructions and the latest information.
Attach to Form 1040, 1040-SR, 1040-NR, or 1041; partnerships generally must file Form 1065.

Name of proprietor

A Principal business or profession, including product or service (see instructions)

B Enter code from instructions

C Business name. If no separate business name, leave blank.

D Employer ID number (EIN) (see instr.)

Form 1065

U.S. Return of Partnership Income

Department of the Treasury
Internal Revenue Service

OMB No. 1545-0123
2020

For calendar year 2020, or tax year beginning _____, 2020, ending _____, 20____.
Go to www.irs.gov/Form1065 for instructions and the latest information.

A Principal business activity

B Principal product or service

C Business code number

Type or kind of business

Name of partnership

Number, street, and room or suite no. If a P.O. box, see instructions.

City or town, state or province, country, and ZIP or foreign postal code

D Employer identification number

E Date business started

F Total assets (see instructions)

\$

Form 1120 (2020)

Schedule K **Other Information** (see instructions)

1 Check accounting method: ☐ Cash ☐ Accrual ☐ Other (specify) _____

2 See the instructions and enter the:
Business activity code no. _____

c Product or service _____

Yes No

PPP Details

First Draw PPP SBA Loan #: This is a ten-digit numeric sequence which was provided on your PPP loan documents. If your First Draw PPP loan was with Pursuit, we emailed this loan number to you on January 20th. This is required for submission to SBA. Also enter your First Draw Loan Amount.

Average Monthly Payroll: The average monthly payroll is the basis for your maximum loan amount calculation. Please review our materials on [how to calculate your PPP loan amount](#) as well as our [Excel calculator](#) to ensure you input correct information. The portal will automatically calculate your loan amount based on program parameters.

PPP Details

Revenue Reduction: Second Draw PPP loan applicants need to show at least a 25% drop in revenue in 2020 compared to 2019. Please review our article on [how to calculate the 25% revenue reduction](#) before inputting these figures. Our simple [Excel calculator](#) can also assist in this calculation.

You must input the specific reference quarters for both 2019 and 2020 along with the gross revenue figures for each period. These figures are required for SBA submission.

PPP Details

The following documents are necessary to apply for your PPP loan. Please visit our [PPP Loan Application Guide](#) for more details on these requirements. It is imperative that full and complete documentation is provided at this stage for your application to move quickly through the process.

- Payroll Justification
- Revenue Reduction
- Business Operating on February 15, 2020

Documentation

Payroll Records

[Upload](#) 

Revenue Reduction Records ("Financial Statement must be signed")

[Upload](#) 

Additional Documents

[Upload](#) 

PPP Details

Various document types can be uploaded – please upload documents to the specific folder as referenced. Please review [our website](#) for specifics on what documents can be provided.

Second Draw applicants seeking to receive a 3.5x payroll maximum loan should also provide tax documents showing a NAICS code beginning with 72.

Upload Information



- Please do not upload Password Protected Documents.
- To avoid delays in processing, Please scan and upload each Document individually to the appropriate Line.
- Supported File Types : .pdf,.xls,.xlsx,.csv,.doc,.docx,.jpg,.jpeg,.png
- File Size should be less than or equal to 35 MB

File Upload

File *



Drag and Drop Files Here (or) Click Icon to Upload a File

Close

PPP Details

Documentation: In order to provide a streamlined approval and funding process, we also recommend you upload the following documents:

- Driver's License, Passport, or other Government Issued Photo ID for all owners of 20% or more of the applicant business.
- Voided Check for the bank account where loan funds will be deposited. Please ensure this matches the name of the business.
- Entity Documents that verify the existence of your business (e.g. Articles of Incorporation, Certification of Formation, DBA Registration).

PPP Details

Purpose of the Loan: Select all the loan uses that you intend to use the PPP loan proceeds for.

Borrower Certifications: Please review questions regarding SBA PPP eligibility. These are critical eligibility questions so please read them carefully when selecting Yes or No.

When complete, select 'Save & Continue' in the bottom right.

1. Is the Applicant or any owner of the Applicant presently suspended, debarred, proposed for debarment, declared ineligible, voluntarily excluded from participation in this transaction by any Federal department or agency, or presently involved in any bankruptcy? * ☐ Yes ☒ No
2. Has the Applicant, any owner of the Applicant, or any business owned or controlled by any of them, ever obtained a direct or guaranteed loan from SBA or any other Federal agency that is (a) currently delinquent, or (b) has defaulted in the last 7 years and caused a loss to the government? * ☐ Yes ☒ No
3. Is the Applicant or any owner of the Applicant an owner of any other business, or have common management (including a management agreement) with any other business? If yes, list all such businesses (including their TINs if available) and describe the relationship on a separate sheet identified as addendum A. * ☐ Yes ☒ No
4. Is the Applicant (if an individual) or any individual owning 20% or more of the equity of the Applicant presently incarcerated or, for any felony, presently subject to an indictment, criminal information, arraignment, or other means by which formal criminal charges are brought in any jurisdiction? * ☐ Yes ☒ No
5. Within the last 5 years, for any felony involving fraud, bribery, embezzlement, or a false statement in a loan application or an application for federal financial assistance, or within the last year, for any other felony, has the Applicant (if an individual) or any owner of the Applicant 1) been convicted; 2) pleaded guilty; 3) pleaded nolo contendere; or 4) commenced any form of parole or probation (including probation before judgment)? * ☐ Yes ☒ No
6. Is the United States the principal place of residence for all employees included in the Applicant's payroll calculation above? * ☐ Yes ☒ No
7. Is the Applicant a franchise? * ☐ Yes ☒ No
8. Is the franchise listed in SBA's Franchise Directory? * ☐ Yes ☒ No

Previous

Save & Continue

PPP Details

Please review question #6 carefully – this asks if the principal place of residence for all employees included in the payroll calculation is the United States. In most instances, the answer to this question is **YES**.

Principal Details

All owners of 20% or greater must be included on the Principal Details tab. Begin by selecting 'Add Principal.'

If the business does not have owners above 20%, at least one owner must be included on the application.

For nonprofits, select an eligible signer and include their information and report as a 20% owner (SBA recognizes that nonprofits do not have owners but requires input).

uctions

Business Info

PPP Details

Principal Details

Certify & Submit

Principal Details

Business Name	First Name	Last Name	SSN Number	Phone Number	Ownership %
---------------	------------	-----------	------------	--------------	-------------

Add Principal

General Information

Is Primary Contact?

☐

Are you a U.S Citizen? *

☐ Yes ☐ No ☐ N/A

Is Business?

☐

First Name*

Title *

Business Name(If Principal is a business)

Last Name*

Social Security Number*

Business Type

% of Ownership *

Email Address *

Office Phone Number

Home Phone Number

Cellular Phone Number

Current Residence

Home Address *

City *

State *

Zip Code*

+4 Zip Code

Principal Details

Primary Contact: At least one person must be designated as the primary contact by selecting the 'Is Primary Contact' toggle button.

Principal Details

Please input ownership information as requested on the form. If an entity is the owner of the business, select the 'Is Business?' toggle button and you will provide business information instead of personal information.

Complete and accurate information is necessary for SBA submission and approval. All owners of 20% or greater must be included in the application.

Demographics (Optional)

Veteran Status

- ☐ Non Veteran ☐ Veteran ☐ Service Disabled Veteran
☐ Unknown/Not Stated

Gender

-- Select Gender --

Ethnicity

-- Select Ethnicity --

Race(Select one or more from the list.)

- ☐ American Indian or Alaska Native ☐ Asian ☐ Black or African-American ☐ Native Hawaiian or Pacific Islander ☐ White ☐ Not Disclosed

Cancel

Add

Principal Details

Demographic information is provided for tracking purposes only and has no bearing on the credit decision. These fields are optional but completion is appreciated.

[Previous](#)[Submit](#)

By Signing Below, You Make the Following Representations, Authorizations, and Certifications

CERTIFICATIONS AND AUTHORIZATIONS

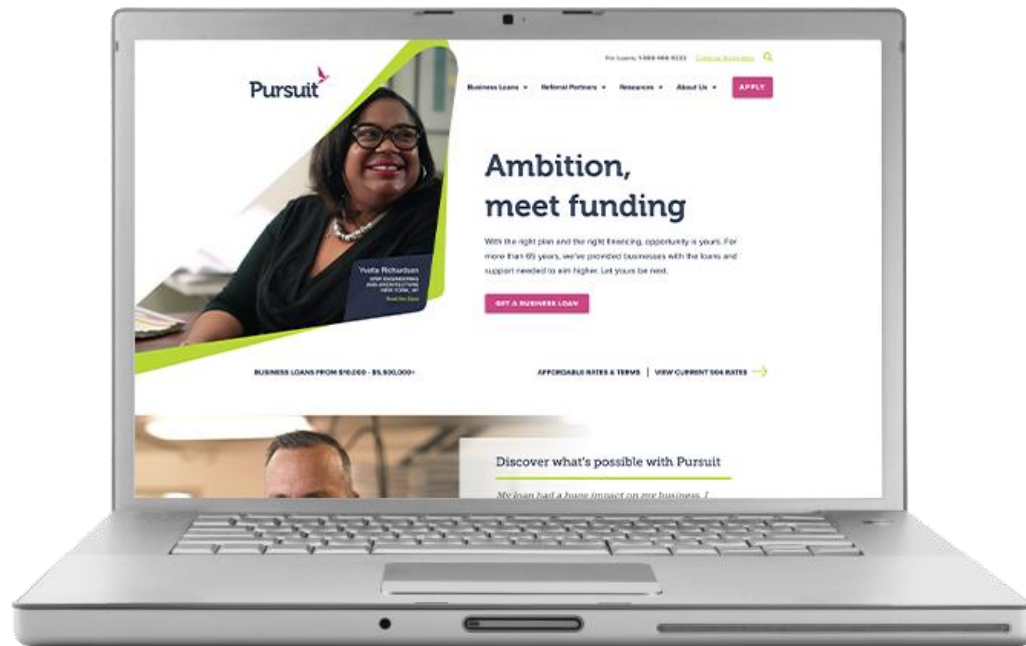
- I certify that:
 - I have read the statements included in this form, including the Statements Required by Law and Executive Orders, and I understand them.
 - The Applicant is eligible to receive a loan under the rules in effect at the time this application is submitted that have been issued by the Small Business Administration (SBA) and the Department of the Treasury (Treasury) implementing Second Draw Paycheck Protection Program Loans under Division A Title I of the Coronavirus Aid, Relief, and Economic Security Act (CARES Act) and the Economic Aid to Hard-Hit Small Businesses, Nonprofits, and Venues Act (the Paycheck Protection Program Rules).
 - The Applicant, together with its affiliates (if applicable), (1) is an independent contractor, self-employed individual, or sole proprietor with no employees; (2) employs no more than 300 employees; or (3) if NAICS 72, employs no more than 300 employees per physical location; (4) if a news organization that is majority owned or controlled by a NAICS code 511110 or 5151 business or a nonprofit public broadcasting entity with a trade or business under NAICS Code 511110 or 5151, employs no more than 300 employees per location.
 - I will comply, whenever applicable, with the civil rights and other limitations in this form.
 - All loan proceeds will be used only for business-related purposes as specified in the loan application and consistent with the Paycheck Protection Program Rules including the prohibition on using loan proceeds for lobbying activities and expenditures. If Applicant is a news organization that became eligible for a loan under Section 317 of the Economic Aid to Hard-Hit Small Businesses, Nonprofits, and Venues Act, proceeds of the loan will be used to support expenses at the component of the business concern that produces or distributes locally focused or emergency information.
 - I understand that SBA encourages the purchase, to the extent feasible, of American-made equipment and products.
 - The Applicant is not engaged in any activity that is illegal under federal, state or local law.

Certify & Submit

Please review the Certifications and Authorizations before submitting your application. All Certifications must be checked in order to submit.

Click 'Submit' and your application is complete!

Helpful Pursuit resources



PPP Application information hub

- [Second Draw PPP Application FAQ](#)
- [Second Draw PPP loan information](#)
- [First Draw PPP Application FAQ](#)
- [First Draw PPP Loan information](#)