

Creating a Second Draw Application for Your Account

Forgiveness Simplified - forgivesmb.com

July 21st, 2021



**Please be advised that for advice on the details of your loan or assurance on specific qualified expenses, you should consult a certified CPA.

Before You Start...

The multiple draw feature is only for loans under the same Tax ID, as that is what the system uses to pull the loan information.

If you have a second business to apply for, **please log out and sign up using a different email**. You may also do this for your Second Draw application if you wish! **It is not required to have both draw applications on the same account.**



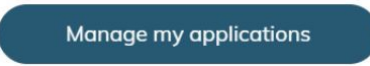
Starting from the Dashboard

The screenshot shows the 'Forgiveness Simplified' dashboard. On the left, there is a sidebar with a 'test company' dropdown menu containing 'First Draw' and 'Click here to select an application'. Below this are links for 'Dashboard' and 'My Application'. The main content area is titled 'Dashboard' and displays 'Tax ID: TIN_citi_000001_0722_19000'. A table lists loan details:

Bank	Loan Amount	Loan Disbursement Date
Citi	\$19,000	07/22/2020

Below the table is a note: 'Note: To submit a Second Draw PPP Forgiveness Application, enter your Profile and click "Start New PPP Draw Forgiveness Application". Please wait until you hear from your lender regarding Second Round PPP Forgiveness to ensure that we have your information. Visit the FAQ for a visual guide on adding this to your account.' A blue button labeled 'Continue Forgiveness Application' is at the bottom.


Upon logging in, **you should see your original first draw loan from 2020**. There are multiple ways to add the second loan application to your account..

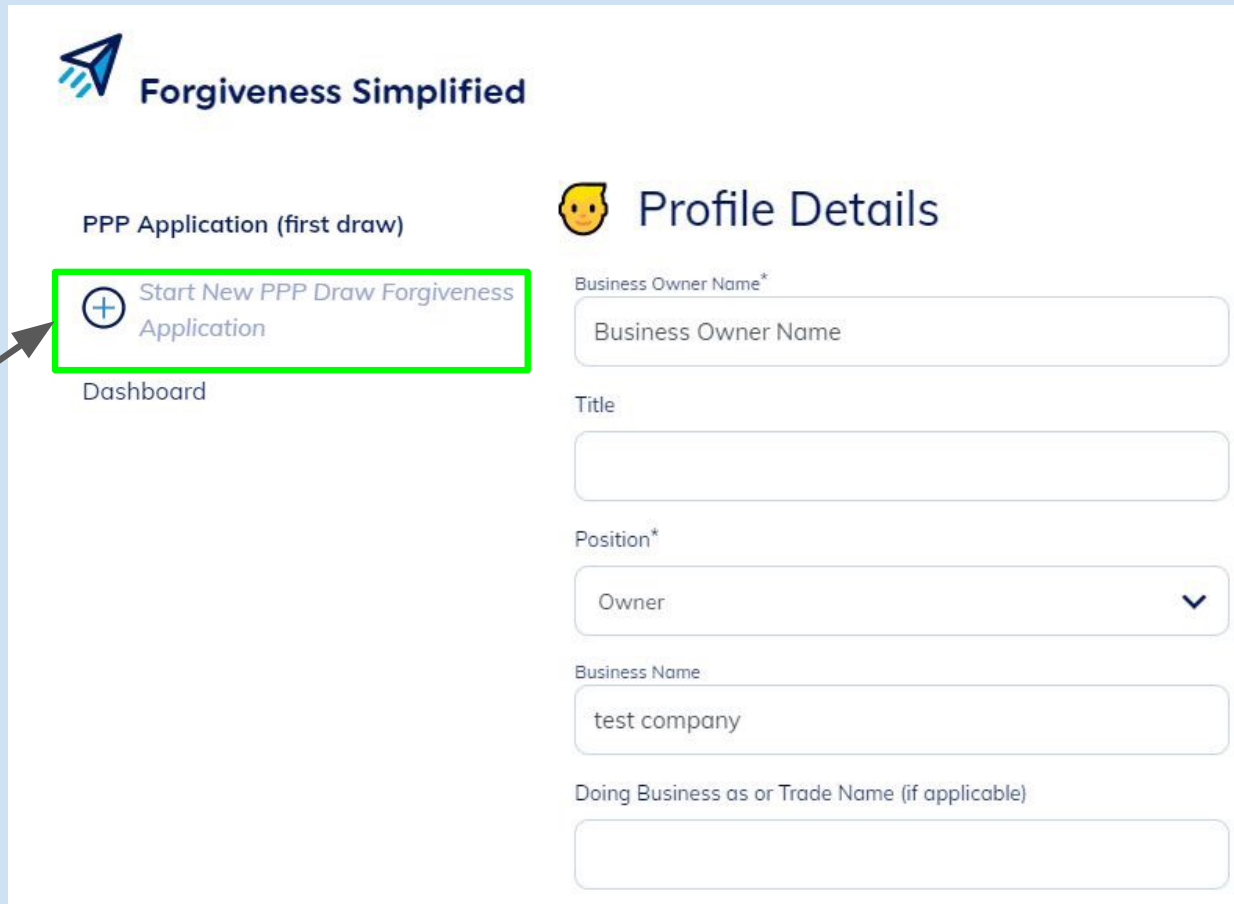
You can enter your Profile (either in the blue text box, or, in the dropdown menu at the top). Or, you can click on the rectangle showing the first draw loan on the left side, then click  to get to the Profile page.



Profile Page - Application Management

Profile details are shared between both applications. If anything needs updated to the present moment, do so and **Save** your information at the bottom!

To begin an application for a Second Draw loan, click the  start button and confirm that this is for a second draw PPP forgiveness application.




The screenshot shows the 'Forgiveness Simplified' profile page. On the left, under 'PPP Application (first draw)', there is a button with a plus icon and the text 'Start New PPP Draw Forgiveness Application', which is highlighted with a green box. Below it is a 'Dashboard' link. On the right, under 'Profile Details', there are several input fields: 'Business Owner Name*' (with a placeholder 'Business Owner Name'), 'Title', 'Position*' (with a dropdown menu showing 'Owner'), 'Business Name' (with a placeholder 'test company'), and 'Doing Business as or Trade Name (if applicable)'. A blue paper airplane icon is visible in the top left corner of the page.




Adding Your Other Loan Information

The system will match your information based on the Loan amount and Disbursement Date provided by your lender.

 Let's Look up your Loan

Tax ID: TIN_citi_000001_0722_19000

Bank	Loan Amount	Loan Disbursement Date
	<input type="text"/>	<input type="text"/>

Please Note: to submit a Second Draw PPP Forgiveness application, please use the dropdown at the top right or click the selected application on the left to manage your applications.

[Start Forgiveness Application](#)

The application process will be the same as the first time around. Enter your info, Click **Add Loan**, then **Start Forgiveness Application!**

***Can't match your loan info? Reach out to The Borrower Support team for help!



Switching Between Applications

The screenshot shows the 'Forgiveness Simplified' dashboard. At the top left is the logo and the text 'Forgiveness Simplified'. Below it is a dropdown menu for 'test company' with 'First Draw' and 'Click here to select an application' options. To the right is a 'Dashboard' header. Below that is the 'Tax ID: TIN_citi_000001_0722_19000'. A table with columns 'Bank', 'Loan Amount', and 'Loan Disbursement Date' is visible. A blue button 'Continue Forgiveness Application' is at the bottom. On the top right, there is a user profile dropdown menu with 'test company ^', 'Profile', and 'Logout' options. Three yellow callout boxes provide instructions: one pointing to the 'Forgiveness Simplified' text, one pointing to the application selection dropdown, and one pointing to the 'Profile' option in the user menu.

To return to the dashboard, click **Forgiveness Simplified**

test company
First Draw
Click here to select an application

Dashboard

Tax ID: TIN_citi_000001_0722_19000

Bank Loan Amount Loan Disbursement Date

000 07/22/2020 ✓

Then, click on this box here to select which application you are working on

Continue Forgiveness Application

Alternatively, you can click the dropdown and enter your Profile Section. This can be accessed anywhere on the application !

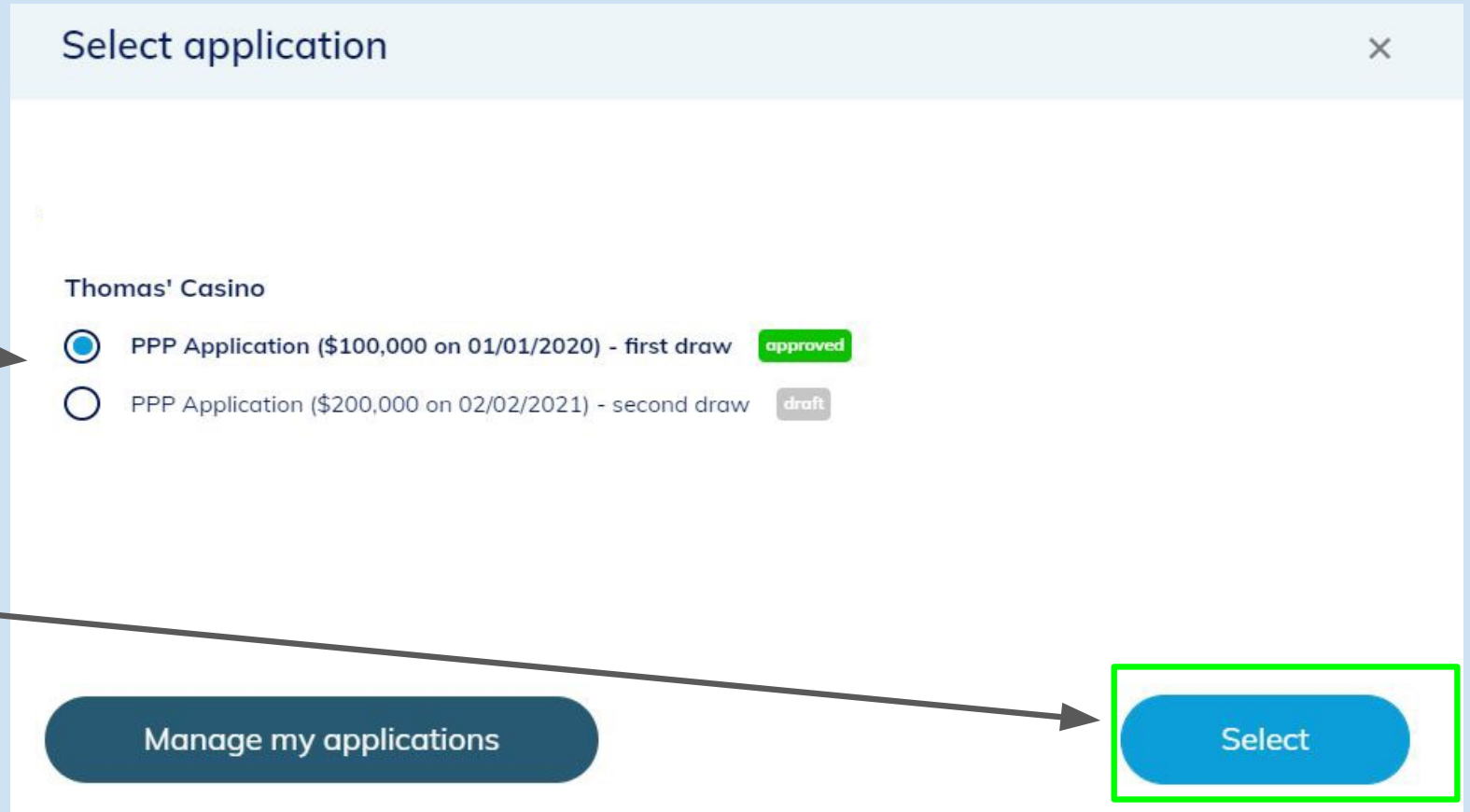
test company ^
Profile
Logout



“Click Here to Select An Application” Option

If you clicked the button from the Dashboard page, you should be faced with this popup.

Here, you can see your applications and which status they are under. Click the bubble you'd like to work on and click **Select**.



The screenshot shows a modal window titled "Select application" with a close button (X) in the top right corner. Below the title, the name "Thomas' Casino" is displayed. There are two application entries, each with a radio button, a description, and a status label:

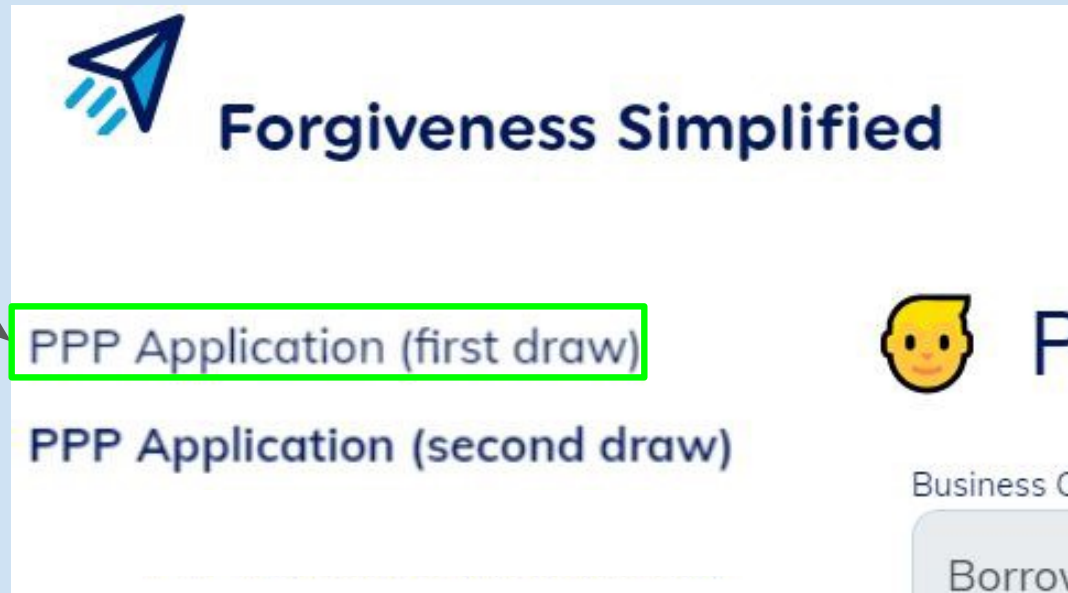
- PPP Application (\$100,000 on 01/01/2020) - first draw **approved**
- PPP Application (\$200,000 on 02/02/2021) - second draw **draft**

At the bottom of the modal, there are two buttons: "Manage my applications" (dark blue) and "Select" (blue). The "Select" button is highlighted with a green border. A yellow box on the left contains explanatory text, with arrows pointing to the application list and the "Select" button.



“Profile Page” Option

The current application you are on will be Bolded. To change applications, click whichever draw you'd like to work on.



PPP Application (first draw)

PPP Application (second draw)

Business O

Borrow

The system will confirm the selection, and clicking Select will return you to the Dashboard page.



Select application

This will change the application you're working on to:

Thomas' Casino / PPP Application (FIRST draw)

Cancel Select



Questions?

Reach out to the Borrower Support team at support@forgivesmb.com

We are available on the site chat as well. If you have a question, please feel free to email or leave your question with your email/business name in the support chat! We will get back to you in one business day.

Let's help you get 100% Forgiveness!

