Washington Trust Bank
Member FDIC

PPP Application Tips

Tips for navigating the loan application portal

We want to help you have a smooth Paycheck Protection Program (PPP) application experience. Please review the Application Portal User Guide prior to beginning your application process. This guide will help you navigate our PPP loan application portal. In addition to the guide, please review the information below.

The Small Business Administration (SBA) will no longer allow affiliate information to be submitted on a Word document. Borrowers are instead required to use SBA Form 3511.

To successfully upload your documents:

- ☐ Do not use special characters in the document file name.
- ☐ Make sure your document is either a PDF or Word document before uploading.
- ☐ All documents included in an application must be 35MB or less in size. If you are trying to upload a single file size in excess of 5MB, please split the files into multiple files.
- ☐ After initial upload, hover over the 'upload button' for the ability to preview and verify the document.

Our loan application portal allows for one document to be uploaded per field. **Here are two options to help you navigate this situation:**

1. You can consolidate the required information into a single document and upload that document to the noted 941 field.
2. You can use one of the identified other document options to upload additional documents.

Please know that if you are missing documents, your banker or a member of our Washington Trust team will reach out to gather the needed documents to move your application forward in the process. You can expect to hear back from our review team within 1 to 2 business days.

Documents/information you may need:

- ☐ Average monthly payroll costs (only applies to businesses with employees)
- ☐ Proof of Payroll Costs (or Self Income)
- ☐ Proof of Ownership
- ☐ Email Addresses for All Owners with 20% or More of the Business
- ☐ Proof of Business Operation and Active Status with Secretary of State
- ☐ If you previously obtained a PPP loan through Washington Trust, we have these documents on file. The application portal will require you to include a document, noting you are an existing client to satisfy this requirement. Please upload that document.

For more information, please visit our resource page on watrust.com/ReliefBill, reach out to your banker or contact our Priority Service team at 800.788.4578.