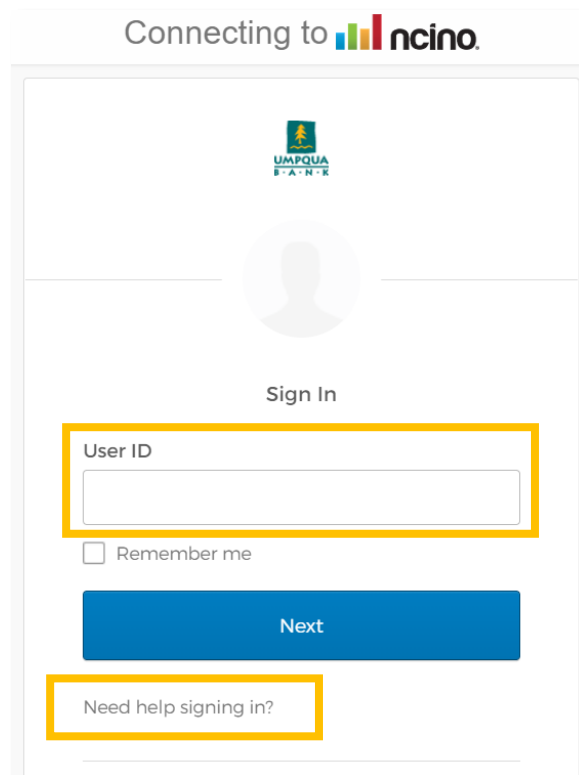





Navigate to the PPP Loan Application Customer Portal

- Navigate to the link below via your browser (note that the application sometimes experiences issues or delays in Internet Explorer, so another browser is preferred. Google Chrome is a best practice.)
 - [Click here to access your Customer Portal](#) with Umpqua Bank
- **Log in** with your credentials or click **Need Help Signing In?**, where you can reset your password or unlock your account



Connecting to  ncino.





Sign In

User ID

Remember me

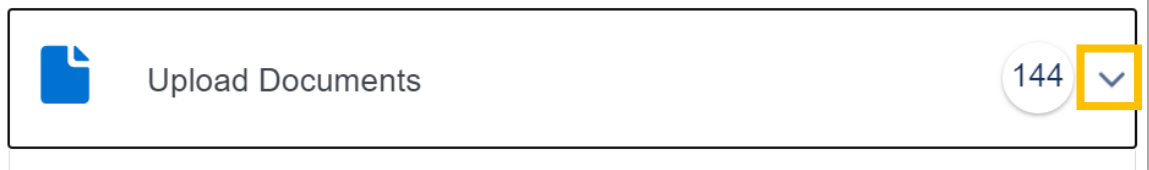
Upload Documents to Loan Application

To complete your application for a Paycheck Protection Loan, you will need to provide documents that provide evidence of payroll. If you are applying for a Second Draw Paycheck Protection Loan, you will also need to provide documents that show a decline in revenue of at least 25%.

See below for instructions and guidance on how to upload acceptable documents.

- On your dashboard, click the drop down next to **Upload Documents**, then browse for your requested or required documents.
 - **Note:** You do not need to upload a document for every placeholder that is available on your To-Do List. **Only upload the documents that apply to your application.** Other placeholders may be ignored and do not need to be filled prior to submitting your application.

✓ TO-DO LIST



The screenshot shows a single item in a 'TO-DO LIST'. On the left is a blue document icon. To its right is the text 'Upload Documents'. Further right is a circular badge containing the number '144'. To the right of the badge is a small square button with a downward-pointing arrow, indicating a dropdown menu.

- *See next page for a list of required documentation.*

Required Documentation (First and Second Draw Loans)

Payroll Documentation:

- **Both First Draw and Second Draw PPP loans** require documentation that shows how much payroll was paid.
 - **For your entity type, please submit just one of the following documents listed:**

Corporations ¹	Partnerships ²	Individuals ³	Tax Exempt Organizations
<ul style="list-style-type: none"> • Form 1120 or 1120 S: ANNUAL Income Tax Return (either 2019 or 2020) <p>OR</p> <ul style="list-style-type: none"> • Form 941: Employer's QUARTERLY Federal Tax Return (all 4 quarters of 2019 or 2020) <p>OR</p> <ul style="list-style-type: none"> • Form 944: Employer's ANNUAL Federal Tax Return (either 2019 or 2020) 	<ul style="list-style-type: none"> • Annual Income Tax Return Form 1065 (either 2019 or 2020. Borrower prepared form 1065 for 2020 is acceptable if final return hasn't yet been filed.) 	<ul style="list-style-type: none"> • Form 1040 - Schedule C (either 2019 or 2020. Borrower prepared form 1040 for 2020 is acceptable if final return hasn't yet been filed) <p>OR</p> <ul style="list-style-type: none"> • Form 1099-Misc (either 2019 or 2020) <p>OR</p> <ul style="list-style-type: none"> • Form 941 OR Form 944 (either 2019 or 2020) 	<ul style="list-style-type: none"> • From 990 Part IX (either 2019 or 2020) <p>OR</p> <ul style="list-style-type: none"> • Form 941 (either 2019 or 2020)

¹ Includes all corporation types, including S-Corporations, C-Corporations, and LLCs that file as corporations.

² Includes LLC's that file as partnerships

³ Includes sole proprietorships, independent contractors, and self-employed individuals

⁴ Includes religious organizations, veterans, and tribes

Required Documentation (Second Draw Loans)

Additional Documents needed for 2nd Draw PPP Loans 25% Reduction

- **Second Draw PPP loans** require that you provide documentation that shows evidence of a drop in revenue of at least 25%.
 - **Please submit evidence of a year over year reduction (i.e. 2020 compared to 2019) OR evidence based on a single quarter from each year (i.e. Q1 of 2020 vs. Q1 of 2019).**
 - **Remember - you don't need to submit both an annually and quarterly. You should provide either quarterly evidence *or* annual.**

Year over Year Reduction of 25%	Quarter over Quarter Reduction of 25%
<p>Provide one of the following for 2019:</p> <ul style="list-style-type: none"> • Business Tax Return • Full Year Financial Statement (Profit and Loss) <p><u>AND</u></p> <p>Provide one of the following for 2020:</p> <ul style="list-style-type: none"> • Business Tax Return • Full Year Financial Statement (Profit and Loss) 	<p>Provide one of the following for the 2019:</p> <ul style="list-style-type: none"> • Quarterly Financial Statement <p><u>AND</u></p> <p>Provide one of the following for the 2020:</p> <ul style="list-style-type: none"> • Quarterly Financial Statement <p><i>NOTE: The dates must match. For example, if submitting a first quarter financial statement for 2020, you must provide a first quarter financial statement for 2019.</i></p>

INSTRUCTIONS

Upload Required Documentation

- From the list of Documentations, locate the requested or required document for your entity and application.
 - Note:** You do not need to upload a document for every placeholder that is available on your To-Do List. **Only upload the documents that apply to your application.** Other placeholders may be ignored and do not need to be filled prior to submitting your application.


Form 944


 1st PPP Loan Request (\$50000.00)


DRAG & DROP
or browse

- Drag & Drop** or click **Browse** to upload a document.


Form 944

 1st PPP Loan Request (\$50000.00)


DRAG & DROP
or browse

- Once you upload all documents, you'll see an **All Caught Up!** message. You will get a notification if you have any additional To-Do List items.

✓ TO-DO LIST



All Caught Up!
You don't have any tasks to complete at the moment, though you can upload supplementary documents anytime. You'll get a notification if you have any additional To-Do List Items.