



# WSFS BANK

## Loan Registration & Adding Delegates

11/13/2020

## Loan Registration

**Loan Registration Overview:** Complete the steps below to register and submit your loan to the Paycheck Protection Program Loan Forgiveness Portal.

### Step 1:

Borrowers will receive an email when their loan has been imported into the system. Select the **Register** or **Register Now** hyperlink to begin the borrower portal registration.

### Reminder:

To register, you will need to enter your:

- SBA Loan Number or Lender Loan Number (either one)
- Loan Amount
- EIN or TIN
- Last 4 digits of SSN

We are pleased to let you know that the WSFS Bank Paycheck Protection Program (PPP) Loan Forgiveness portal is now accepting forgiveness applications. We have partnered with BDO USA to process loan forgiveness applications and encourage you to [register](#) as soon as possible to begin using the portal and review the documents you will need to apply.

You will need the following information to register and begin using the portal:

- SBA Loan Number or Lender Loan Number
- Covered Loan Amount
- EIN or the last four digits of your Social Security Number

If you have multiple PPP loans, you will be able to select the applicable loan after logging in.

Thank you for being a WSFS Bank Customer. We stand ready to serve you.

[Register Now](#)

Regards,

Candice Caruso

SVP, Government Guaranteed Lending  
WSFS Bank

## Step 2:

Enter your SBA Loan Number or Lender Loan Number. Enter your Loan Amount. Enter the last 4 digits of your TIN.

Select **Next**.

Register with WSFS Bank

Start the registration process with either the SBA Loan Number or the Lender Loan Number.

SBA Loan Number      Lender Loan Number

OR

Loan numbers should be entered with no spaces or special characters.

Enter the Covered Loan Amount and the last 4 of the EIN to continue.

Covered Loan Amount

Last Four Of Your Business TIN \*

Cancel    **Next**

## Step 3:

Enter your First Name, Last Name, Email, Cellular Phone Number, and Title. Select **Complete Registration**.

**Note:** Your cellular phone number will be used for multi-factor authentication (MFA) verification.

Register with WSFS Bank

First Name \*      Last Name \*

Email \*      Cellular Phone Number \*

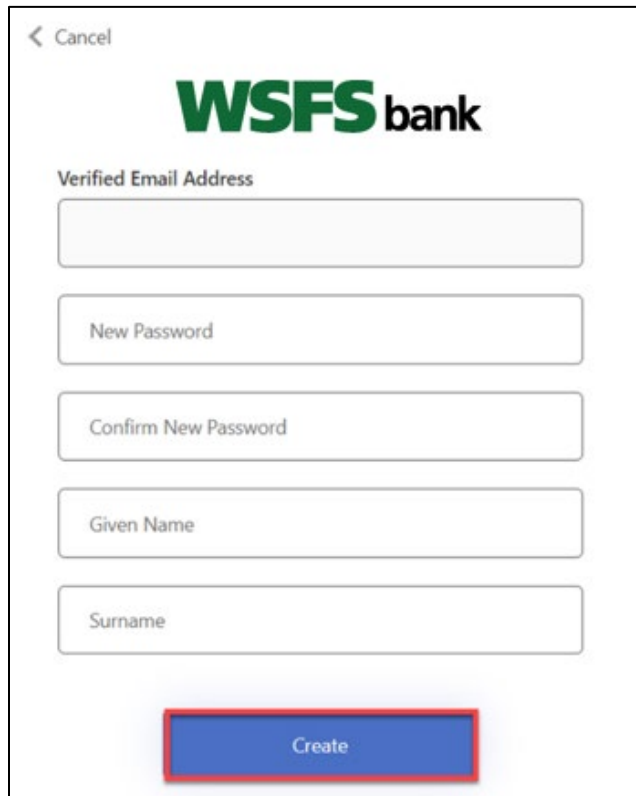
After completing the registration process, you will be navigated to an Azure Confirmation page. Once the confirmation is completed, you will then be navigated to your Loan.

Cancel    **Complete Registration**

## Step 4:

Verify your email address. Create and confirm a new password. Enter your name.

Select **Create**.



< Cancel

## WSFS bank

Verified Email Address

New Password

Confirm New Password

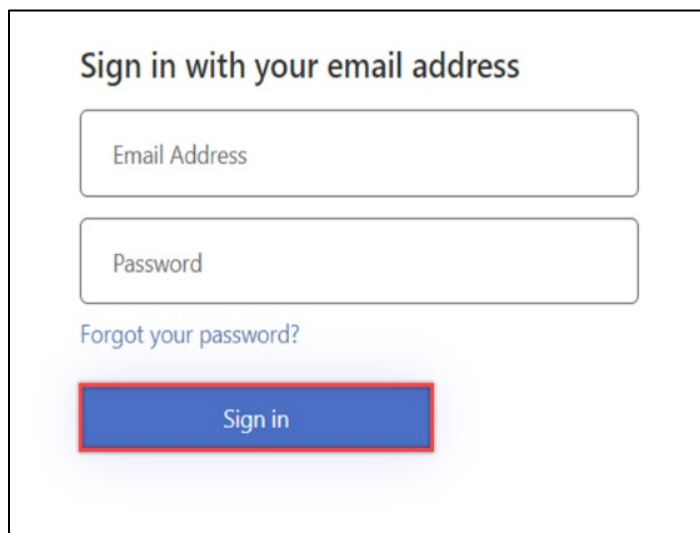
Given Name

Surname

Create

## Step 5:

Sign in with your registered email address and password. Select **Sign in**.



### Sign in with your email address

Email Address

Password

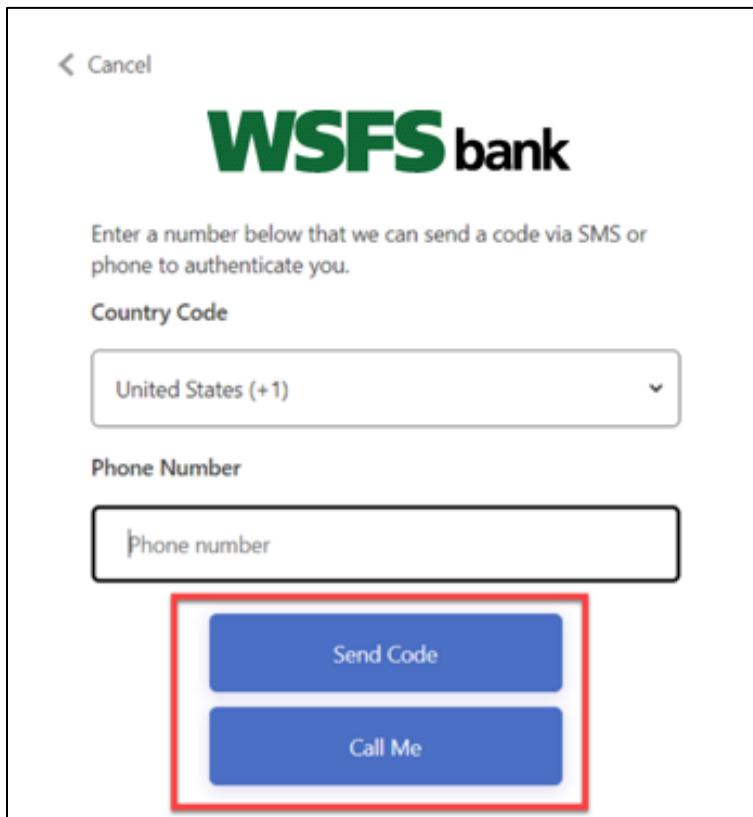
[Forgot your password?](#)

Sign in

## Step 6:

As an additional security measure, you will be asked to enter a multi-factor authentication (MFA) code. Choose if you want to have the code sent to you via text messaging or a phone call.

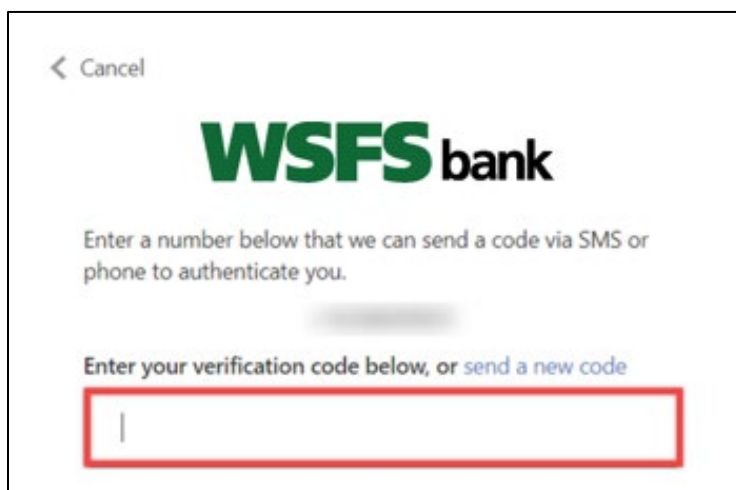
**Note:** If you chose the Call Me option, you need to answer the phone and select “#” on your phone’s dial pad to verify your identity.



A screenshot of the WSFS bank mobile app interface. At the top left is a back arrow and the word "Cancel". The WSFS bank logo is centered. Below the logo is the instruction: "Enter a number below that we can send a code via SMS or phone to authenticate you." There are two input fields: "Country Code" with a dropdown menu showing "United States (+1)" and a downward arrow, and "Phone Number" with a text input field containing the placeholder "Phone number". At the bottom, two blue buttons are stacked: "Send Code" on top and "Call Me" on the bottom. A red rectangular box highlights both of these buttons.

## Step 7:

If you chose the **Send Code** option, enter the verification code.



A screenshot of the WSFS bank mobile app interface for verification. At the top left is a back arrow and the word "Cancel". The WSFS bank logo is centered. Below the logo is the instruction: "Enter a number below that we can send a code via SMS or phone to authenticate you." Below this is a blurred area. At the bottom, there is a text prompt: "Enter your verification code below, or [send a new code](#)". Below the prompt is a text input field with a red rectangular box around it, containing a vertical cursor.

**Step 8:**

Congratulations! You have been redirected to the Borrower Forgiveness Portal.

Application Type: Direct Entry

Welcome Step 1 Step 2 Step 3 Step 4 Instructions

Welcome

Our goal is to streamline your PPP Forgiveness application. We have provided some options to help you complete the process.  
Your loan may be eligible for the 3508S form which simplifies the Forgiveness process. This option is only available for loans \$50,000 and under.  
In order to determine if you are eligible to use this form, please answer the below question.

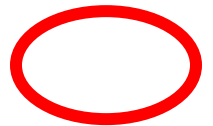
Is this loan affiliated with businesses who have CARE PPP loans that total \$2 million or more?

## Adding Delegates

**Delegate Overview:** If a delegate is assisting in completing your application (e.g., CFO, Accountant), please include their information using the process outlined below. Don't forget, a delegate can fill out the loan forms, but they cannot eSign the application. The SBA requires the individual who signed for the loan to also sign the Forgiveness application.

**Step 1:**

Select **Add Delegate** in the upper right-hand corner of the Welcome screen.



Application Type: Direct Entry

Who is a delegate? Your business' CPA, CFO or bookkeeper who you want to have access to provide supporting information to complete your forgiveness application.

### Welcome

Our goal is to streamline your PPP Forgiveness application. We have provided some options to help you complete the process.  
Your loan may be eligible for the 3508S form which simplifies the Forgiveness process. This option is only available for loans \$50,000 and under.  
In order to determine if you are eligible to use this form, please answer the below question.

Is this loan affiliated with businesses who have CARE PPP loans that total \$2 million or more?

Save

## Step 2:

Select **New Delegate**.

### Add Delegate

You may invite a delegate to complete this application on your behalf. Your delegate may complete the application and upload your required documentation. Once complete you will be required to review the delegate's input, certify the application, sign it and submit it.

Existing Delegates:

First Name	Last Name	Email Address	Title	Registered
No data available in table				

**New Delegate**

## Step 3:

Enter the First Name, Last Name, Email Address, and Title of the delegate. Select **Invite**.

**Note:** The delegate will receive a loan registration email and will need to complete the same loan registration process to gain access to the loan.

### Invite delegate to this loan:

First Name \*      Last Name \*      Email Address \*      Title \*

**Invite**