

CUSTOMER PORTAL DOCUMENT MANAGER FAQ

// FREQUENTLY ASKED QUESTIONS (FAQ)

This FAQ is intended to provide guidance and simplification to customers while uploading documents from the Dashboard into Document Manager (DocMan). DocMan is the vehicle that will be used by customers to provide required and supporting documentation. Customers will upload documentation into specific placeholders provided based on the type of Loan Forgiveness application.

How do I determine what required documentation I will need for the Loan Forgiveness application?

Renasant bank has created the Loan Forgiveness Document Requirements spreadsheet for customer guidance. Customers may access this document through the following link:

[PPP-Loan Forgiveness Document Requirements](#)

Customers are encouraged to review and gather the applicable documents as it relates to your Loan Forgiveness request.

IMPORTANT: When providing proof of payment on expenses, invoices may not be sufficient. Applicants for loan forgiveness are encouraged to provide card statements or cancelled checks as to proof of payment.

Document Upload Helpful Tips:

- Only upload one document for each document type
- Wait until there is a check mark next to the document before loading the next file
- Per SBA requirements, each placeholder is limited to a file size of 25mb
- Be sure proof of payment is provided for all eligible costs
- For all non-payroll expenses include evidence the obligation was in place prior to 2/15/2020

How do I upload documents into the document placeholders?

On the Dashboard page, click on the arrow for upload documents. From here you can drag and drop files or click the browse button to use the folder explorer to upload documents. Depending on the application request, not all placeholders will be applicable and may not require document upload. Important: When uploading documents into the placeholder you must wait until the file reads "awaiting review" before loading the next file.

What if I have multiple documents of the same type (e.g. May Utility Bill, June Utility Bill)?

It is recommended that you combine multiple statements into a single document. Adobe, for example, allows you to select multiple files and combine into a single pdf or scan all related documents into one file named to reflect the information within the document. Important: Only one document upload for each placeholder is allowed. See use of "Additional Document" placeholder below if necessary.

When I upload a document, is there a limit on the size of the file?

Each placeholder is limited to a file size of 25mb per the SBA. If you receive an error message that states "File Size Limit Surpassed" when loading multiple documents/a large file into the placeholder, you will need to reduce the size of the file being loaded to 25mb or lower.

What if I have additional documents or supplemental files that need to be uploaded?

Customers may use the Additional Documents placeholder. Multiple files may be uploaded in this section unlike the specified placeholders provided. For each up load in this placeholder, it is recommended that files be combined by information type and a descriptive file name be included:

- Business Name
- Document Description
- Support reason for the document

e.g. May utility bill for John's Restaurant – should reflected as John's Restaurant_May Utility Bill_nonpayroll costs.

Can I upload two or more files into one placeholder?

No. Only one file can be loaded into the specific placeholders. If there are multiple files for a specific placeholder, it is recommended that the guidance for combining files mentioned previously, be followed. If there is no ability to combine multiple files, see instruction for use of "Additional Documents" which will allow for multiple file uploads.

Do I need to place a document in every placeholder?

Document requirements for initial submission are only required for those placeholders that apply for supporting information required relevant to your application. See Documentation Requirements and/or SBA Application Instructions for further details.

What happens after I have completed my application and submitted all of the documents in the portal?

Renasant Bank will contact you if there are additional required documents or steps needed to process the forgiveness of your loan. Emails may get caught in SPAM or a junk folder. Please look for emails from pppforgiveness@renasant.com

Renasant Bank will provide status updates to include:

- Final review and submission of the application to the SBA
- Final review and decision from the SBA

Where should I go if I am having an issue accessing the Customer Portal?

As a reminder, Google Chrome is the optimal internet browser when accessing the Customer Portal.

How to Download and Install Google Chrome

- Download the installation file <https://www.google.com/chrome/>
- If prompted, click Run or Save
- If you chose Save, double-click the download to start installing

For technical support, email customerportalsupport@renasant.com or call the Customer Portal Support Team at (662) 680-3900. Leave a detailed message to include your name, business name, loan number, a brief description for your inquiry, and the best contact method to reach you.

What if the information in the portal is incorrect or has changed?

If any information is not correct or has changed, customers should please contact pppforgiveness@renasant.com.

For additional information on the Customer Portal and the Loan Forgiveness Application, customers can also access the [PPP Loan Forgiveness Customer Portal User Guide](#).