

# Welcome Training for Contractors



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#### Introduction

- Designed to simplify the process of applying for SBA bonds.
- This system is geared for use by the following users
  - Agents
  - Contractors
  - Sureties
  - SBA Employees
- This system offers the following advantages:
  - Assists users in entering bonds.
  - The ability to view/update information on the business and management.





### **General Login System**

Connect to the Internet and enter <a href="https://eweb.sba.gov/gls">https://eweb.sba.gov/gls</a> in the URL. Enter your User ID and Password and click on the Login pushbutton.

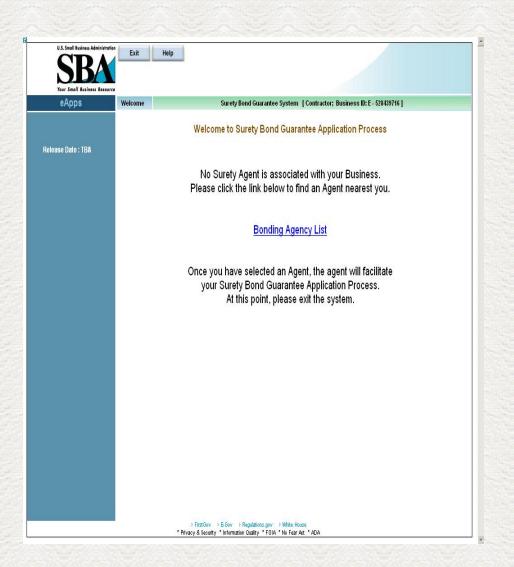




# General Login System – Choose Function

- The General Login System Choose Function screen specifies the functions that you are able to access.
- Select the "Surety Bond Guarantee Applications" hotlink.

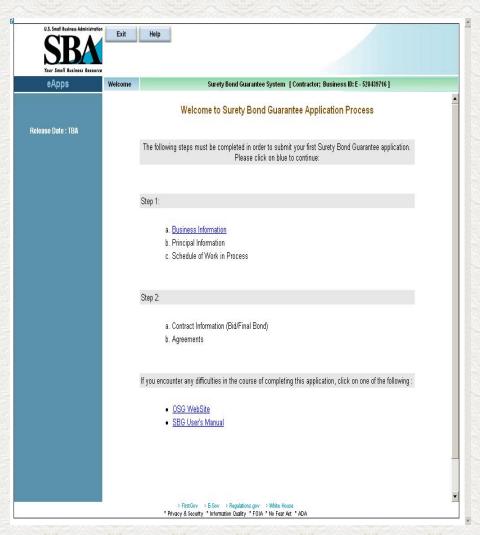




#### Logging In

Prior to inputting your first application, you must be associated with a participating surety bond agency or surety branch office. This association is done by the surety bond agency or surety branch office and is called the "contractor initialization".





# **Submitting the First Bond Once Initialized**

The Contractor Welcome screen displays for the first Bond application that you are entering.

It guides you through the setup and submission of your business and first bond information. This screen also indicates which steps you have completed. It prompts you to submit details for:

- Business Information
- Principal Information
- Schedule of Work in Process
- Contract Information (Bid/Final Bond)
- Agreements





#### **Business Information**

Use the *Business Information* screen to enter the requested business information which is required prior to entering your first bond application.

You can update the information on this screen anytime if changes occur.





# **Business Information** (Saved)

Once the business information is submitted, this screen will display.





#### **Principal Information**

Use the *Principal Information* screen to enter the requested principal information which is required prior to entering your first bond application. You can update the information on this screen anytime if changes occur.

Note: Principal information for each of the following individuals is required:

- · Proprietor of a Sole Proprietorship
- · Partner of a Partnership
- Officer, Director, or Holder of 20% or more of the ownership stake of a Corporation, LLC, or Development Company



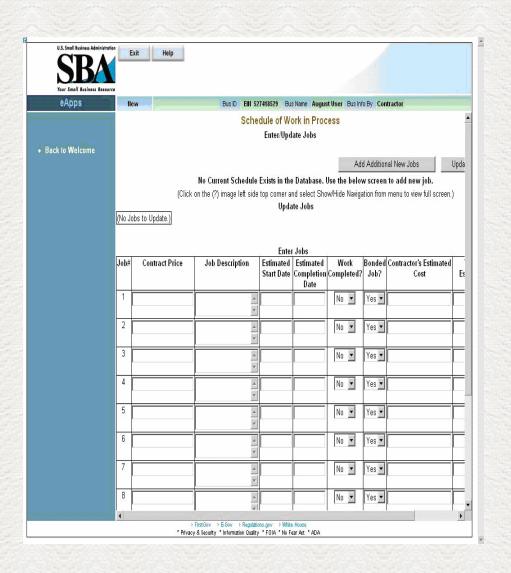


# Principal Information (Saved)

Once you submit principal information, this screen will display.

If you have any work schedules to be entered, you can click on the Schedule of Work in Process hotlink, otherwise you can click on the Contract Information (Bid/Final Bond) hotlink to continue inputting your application.



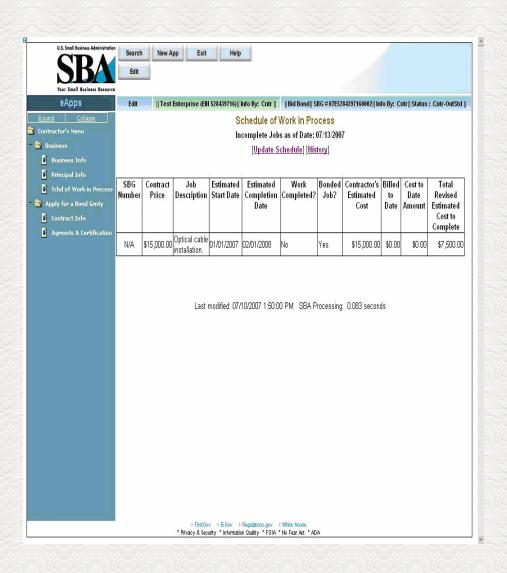


# First Bond (Schedule of Work in Process)

Use the Schedule of Work in Process screen to enter requested work in process information. You must enter the information for all jobs that you have started.

The Schedule of Work in Process screen must be updated at least every three months, but can be updated anytime. Any approved SBA bonds will automatically populate the screen.





# Schedule of Work in Process (List)

Use the Schedule of Work in Process (List) screen to review the work in process information that you entered in the Schedule of Work in Process screen. Click on the Schedule of Work in Progress link on the Welcome screen to access this screen.





#### **List of Schedules**

Use the *List of Schedules* screen to review all of the schedules that you have inputted.

Access this screen by clicking on the History hotlink in the *Schedule of Work in Process* screen.



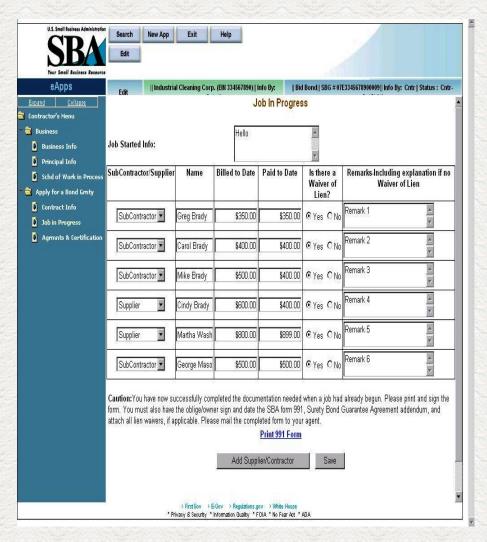


#### **Contract Information**

Use the *Contract Information* screen to enter the required information about the contract.

You must complete this step for all bond applications.





### **Job in Progress**

Use the *Job in Progress Information* screen to enter information about the job if you have already started it.

Note: Job in Progress information is optional. You will be directed to this screen only if you answer "Yes" in the "Contractor Job Started" field (in the *Contract Information* screen).

You must input information in all of the fields on this screen for each subcontractor or supplier that you have used on this job.

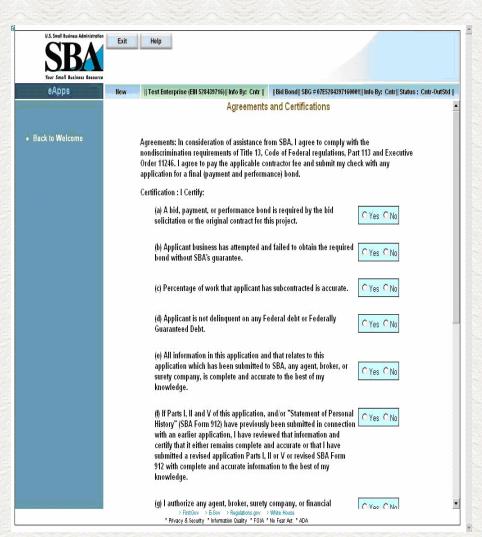




# Jobs in Progress (Saved)

This screen indicates a successful save of the *Job in Progress* screen.





### **Agreements and Certifications**

Use the *Agreements Information* screen to verify that you comply with the requirements set forth in the opening paragraph at the top of the screen.

Note: To save this application, you *must* answer "Yes" or "No" to all of the questions. However, if you answer "No" to any of the questions, the system will display a message and will prevent you from continuing to process the application. In addition, you will *not* be able to submit the application to your agent and should contact your agent.



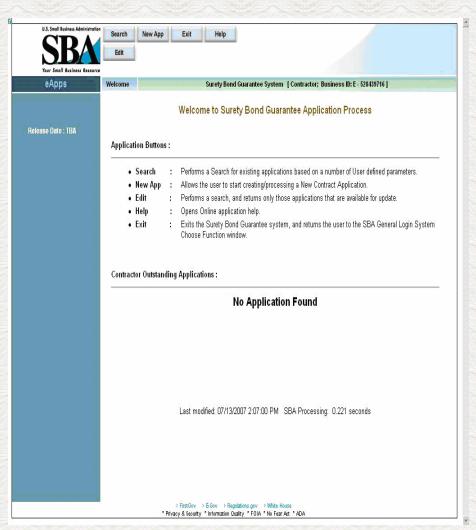


# Agreements Information (Submitted)

Once you submit agreements information, this screen will display.

Click on the hotlinks to access the various SBA forms in .pdf. They will be populated with the information that you have input. You must print, sign, and mail them to your agent. (Note: The Surety Bond Guarantee Addendum (SBA 991) is only required if the job has started. The Statement of Personal History (SBA 912) is required with the first application and if changes occur. The Application for Surety Bond Guarantee Assistance (SBA 994) is required with each application.)



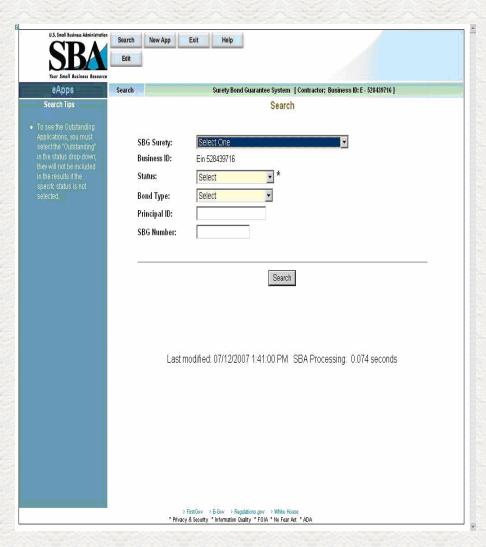


### **Submitting Subsequent Bonds**

After you have completed your first bond application, you will see the Contractor *Welcome* screen.

This screen lists all the bonds that you have entered but have not yet submitted to your agent .





#### Search

When you click on the Search pushbutton at the top of the screen, this screen will display.

Enter the criteria for your bond search on the screen.





### **New App Information**

For subsequent applications, you must complete the *Contract Information* screen, the *Job in Progress* screen (if applicable) and the *Agreements* screen.

After you save the information on each screen, the system will take you to the next screen for input.

To enter a new application (after completing your first application), click on the New App pushbutton and the *Contract Information* screen will display.





#### **Edit Information**

To edit an existing bond, select the Edit pushbutton.

A list of all bonds for your business that have a status of "Contractor – Outstanding" will display. You may edit any of these bonds by clicking on the hot link.