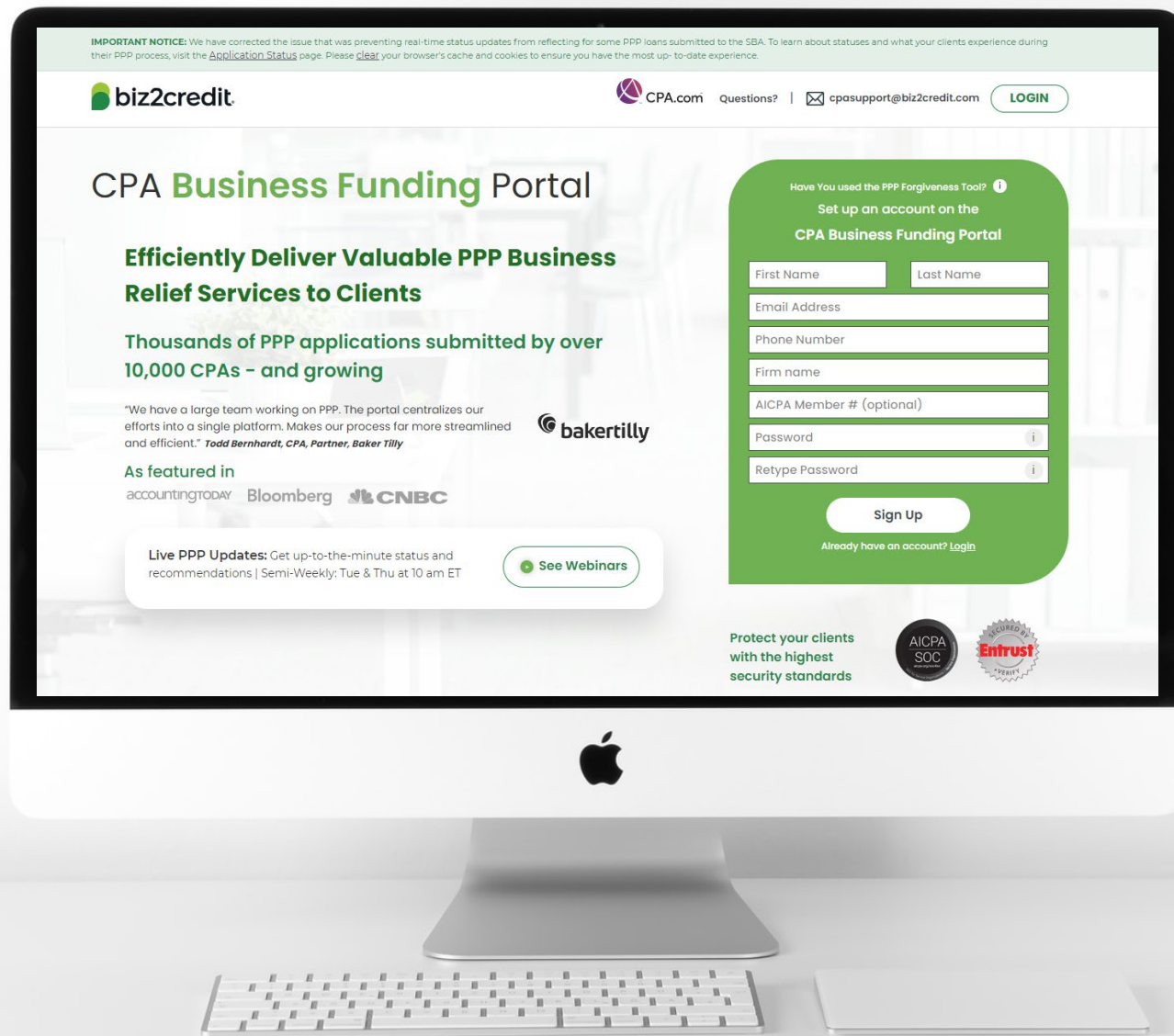




CPA **Business Funding** Portal

Live PPP Service Updates

February 11, 2021



Operational Updates From CPA Loan Portal Customer Care

Resource Hub: Portal Dashboard

The screenshot shows the biz2credit portal dashboard. At the top, there's a navigation bar with links for 'Watch PPP Update Webcasts', 'CPA.com', 'Upgrade', and 'FAQs'. The 'FAQs' link is circled in red. Below the navigation bar, there's a 'Dashboard' section with a 'Create New Client' button. A banner for 'PPP Live Updates Webcast Series' is displayed. The main content area is divided into three columns. The left column has a red box around the 'New Resources to help you understand the PPP client experience' section, which includes links for 'How this works with ACH setup', 'See the client experience', and 'Download a client guidebook'. The middle column has a red box around the 'Important News' section, featuring an 'AICPA Letter to SBA and Treasury on Processing Errors' with a 'Read Letter' button. The right column has a red box around the 'Clients' section, which shows '2 Client in past 15 days' and '2 Total clients'. Below these sections, there's a search bar with 'Client Name' and 'Email Address' fields, a 'Search' button, and a toggle for 'Client view' and 'Business view'. At the bottom, there's a table with columns for 'Client Name', 'Client ID', 'Phone Number', 'Email Address', 'Existing Client Applications', and 'Action'. The table lists two clients, both named 'Jesse Turner', with their respective IDs, phone numbers, and email addresses. The 'Existing Client Applications' column shows '1' for each client. The 'Action' column contains icons for editing, viewing, and deleting. A red arrow points from the 'Clients' section to the 'vimeo' video player on the right.

Watch PPP Update Webcasts **CPA.com** **Upgrade** **FAQs**

Dashboard **Create New Client**

PPP Live Updates Webcast Series – Join Biz2Credit and CPA.com CEOs every Tuesday and Thursday at 10am ET

New Resources to help you understand the PPP client experience
The SBA requires lenders to work directly with borrowers to ensure compliance with PPP rules and regulations. Clients that your firm submits will be required to input information in their Biz2Credit accounts at some points in the process following submission. Use these resources to understand the process fully and continue your role as advisor to your clients every step of the way.
[How this works with ACH setup](#) | [See the client experience](#) | [Download a client guidebook](#)

Important News:
AICPA Letter to SBA and Treasury on Processing Errors
Learn about SBA processing errors which create delays for clients
[Read Letter](#)

Clients
2 Client in past 15 days
2 Total clients

PPP Forgiveness
1 Applications
1 Total clients

PPP Applications
1 PPP applications
1 Total clients

Search ☐ Client view ☐ Business view

Client Name	Client ID	Phone Number	Email Address	Existing Client Applications	Action
Jesse Turner	BIZ1735295	(212) 596-6244	test@hq.cpa.com	1	Edit View Delete
Jesse Turner	BIZ10512247	(212) 596-6244	jesse.turner@hq.cpa.com	1	Edit View Delete

Page 1 of 1

The screenshot shows the 'Help & Frequently Asked Questions' section of the biz2credit portal. It features a 'How-To Videos' section with two video thumbnails: 'CPA Business Funding Portal' and 'How-To Videos User Management'. Below this, there's a 'FAQs' section with a list of questions and answers. The questions include: 'What is the deadline to apply for a new PPP loan?', 'How much are the agent fees?', 'What resources exist for me to better understand the PPP lending process?', 'If my client received Forgiveness on their first PPP loan, can they apply for and receive a second PPP loan?', 'If my client has not received Forgiveness on their first PPP loan, can they apply for and receive a second PPP loan?', 'Can my client participate in the Paycheck Protection Program (PPP) if they received an Economic Injury Disaster Loan (EIDL)?', and 'If my client's first PPP loan is currently under SBA review, can they apply for a second PPP loan?'. A red arrow points from the 'FAQs' link in the top navigation bar to this section.

Help & Frequently Asked Questions

How-To Videos

CPA Business Funding Portal
How-To Videos
Government Declaration and E-Sign for PPP
[biz2credit](#) [CPA.com](#)

CPA Business Funding Portal
How-To Videos
User Management
[biz2credit](#) [CPA.com](#)

FAQs

PPP Technical Accounting Topics

- Q. What is the deadline to apply for a new PPP loan?
- Q. How much are the agent fees?
- Q. What resources exist for me to better understand the PPP lending process?
- Q. If my client received Forgiveness on their first PPP loan, can they apply for and receive a second PPP loan?
- Q. If my client has not received Forgiveness on their first PPP loan, can they apply for and receive a second PPP loan?
- Q. Can my client participate in the Paycheck Protection Program (PPP) if they received an Economic Injury Disaster Loan (EIDL)?
- Q. If my client's first PPP loan is currently under SBA review, can they apply for a second PPP loan?

The screenshot shows a Vimeo video player displaying a video titled 'Learn: The ACH Setup Process for PPP'. The video is from the biz2credit channel. The video player includes a search bar, a 'Log In' button, and a 'Join' button. Below the video player, there's a description of the video: 'Understand the borrower experience for ACH account set up within the Biz2Credit lending platform. The CPA Business Funding Portal is brought to you by Biz2Credit and CPA.com.' There's also a 'Customizable Player' section with a 'Learn more' button. A red arrow points from the 'vimeo' video player in the main dashboard to this video player.

Learn: The ACH Setup Process for PPP

biz2credit **CPA.com**
CPA Business Funding Portal
Add ACH Details

2 weeks ago · More
[Biz2Credit](#) [CPA.com](#)

787 views · 0 likes · 0 comments · [Download](#) [Share](#)

Understand the borrower experience for ACH account set up within the Biz2Credit lending platform. The CPA Business Funding Portal is brought to you by Biz2Credit and CPA.com.

Customizable Player.
A Vimeo Feature
[vimeo](#) [Learn more](#)

More from Biz2Credit

Our Customer Care Teams

Customer Service Managers

cpasupport@biz2credit.com

- Status of applications
- Process workflow questions – guidance on next steps in loan application process
- CPA loan portal error messages
- “How to” upload ACH/Banking information (once available)

Best Practices to optimize PPP loan processing

- ✓ For Draw 2s, be sure to use the same EIN/SSN used for Draw 1
- ✓ Accurate number employee input
- ✓ Review loan documentation for accurate information before signing

Biz2Credit Funding Specialists

- Assist with add'l documentation requirements
- Trigger ACH/Bank information upload step
- Address questions related to incorrect loan amounts
- Complete application/loan package prior to funding
- Withdrawal requests

Biz2Credit Technology Support

For user login issues & password resets, please email:

techhelp@biz2credit.com

Continuing Customer Care Improvements

- The volume of inbound questions to our customer care team remains high
- Our team is working around the clock to effectively resolve cases for CPA firms and their clients. We have continued to add additional people to increase our capacity to resolve issues more quickly.
- Many applications (~30%) are requiring additional attention due to additional SBA validation & review processes aimed to prevent fraud.
- Some unique issues with applications require a **Biz2Credit Funding Specialist** to resolve. If a borrower's application requires Funding Specialist assistance, one will be assigned.
***NOTE:** Funding Specialists are working diligently to address issues, which in some cases take a week or more depending on clarity around resolution from the SBA*
- Please take advantage of the self-serve resources as a first step to find answers to your questions while our Customer Care team triages issues requiring additional support

Reminder: Collaborate to Improve Client Experience

IMPORTANT MESSAGE

Escalate high importance cases to promote faster resolution for in-need borrowers –

Use the channels via the customer service department to escalate clients that need desperate attention in order to stay in business. Emergency cases should be given priority – help us help your clients by prioritizing the most in-need.

IMPORTANT MESSAGE

SBA continues to advise of sufficient program funding, so set the right expectations with clients –

Manage expectations with clients about the turnaround time for loan decisioning and disbursement. This is not the same as Round 1 in April. Slower process, more validation, longer wait times. Set the right tone with clients to avoid disappointment and frustration.



Advice for faster processing

Share the steps in the journey with clients in advance and provide guidance about the SBA processing errors and delays to set proper expectations. Submit as many applications as possible without contacting customer service to get these applications processing sooner. Review the available resources prior to contacting customer service – answers to common questions usually already available. Use the customer service function to escalate technical challenges and for your clients in most desperate need.

Customer Service & Communication Plan

Contact Us

Service Inquiries about the Portal
email address on your portal

PPP Guidance from AICPA
pcps@aicpa.org

Technical Issues (e.g. Login)
techhelp@biz2credit.com

Find Resources

Check for frequent **emails** from
cpa@biz2credit.com that
highlight Portal updates and
processing information for CPAs

View resources and videos on
your CPA Business Funding Portal
dashboard

Join us twice a week in these
live update webinars

Faster Processing

~600

inquiries answered
every day.

Join us on Thursday at 10am ET