



# CPA **Business Funding** Portal

Live PPP Service Updates

February 16, 2021

**IMPORTANT NOTICE:** We have corrected the issue that was preventing real-time status updates from reflecting for some PPP loans submitted to the SBA. To learn about statuses and what your clients experience during their PPP process, visit the [Application Status](#) page. Please [clear](#) your browser's cache and cookies to ensure you have the most up-to-date experience.

**biz2credit.**



CPA.com

Questions?

✉ [cpasupport@biz2credit.com](mailto:cpasupport@biz2credit.com)

LOGIN

## CPA Business Funding Portal

**Efficiently Deliver Valuable PPP Business Relief Services to Clients**

Thousands of PPP applications submitted by over 10,000 CPAs - and growing

"We have a large team working on PPP. The portal centralizes our efforts into a single platform. Makes our process far more streamlined and efficient." *Todd Bernhardt, CPA, Partner, Baker Tilly*



As featured in

accountingtoday

Bloomberg

CNBC

Live PPP Updates: Get up-to-the-minute status and recommendations | Semi-Weekly: Tue & Thu at 10 am ET

See Webinars

Have You used the PPP Forgiveness Tool? ⓘ

Set up an account on the

CPA Business Funding Portal

First Name

Last Name

Email Address

Phone Number

Firm name

AICPA Member # (optional)

Password ⓘ

Retype Password ⓘ

Sign Up

Already have an account? [Login](#)

Protect your clients with the highest security standards



# Operational Updates From CPA Business Funding Portal Customer Care

# Resource Hubs: Portal Dashboard & CPA.com/PPPResources

## Portal Dashboard

**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

Client Name | Email Address | 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	<a href="#">Edit</a> <a href="#">PPP</a> <a href="#">Archive</a> <a href="#">Delete</a>
Jesse Turner	BIZ10512247	(212) 596-6244	jesse.turner@hq.cpa.com	1	<a href="#">Edit</a> <a href="#">PPP</a> <a href="#">Archive</a> <a href="#">Delete</a>

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## CPA.com/PPPResources

**Important Resources & Information**

**PPP RESOURCES, UPDATES, AND INFORMATION FROM THE AICPA**  
[AICPA Letter to SBA and Treasury on Processing Errors](#)  
[How this works with ACH setup](#)  
[See the client experience](#)  
[Download a client guidebook](#)

**CPA BUSINESS FUNDING PORTAL**  
Reg. and Accred. Checklist  
PPP Loan Tracker, Overview, Webinars  
FAQs, News, and Other Helpful Resources

**SEMI-WEEKLY CUSTOMER SERVICE UPDATE WEBINARS: KEY HIGHLIGHTS AND ACCOMPANYING COMMENTARY**  
[October 2020: PPP Application and Forgiveness Updates](#)  
[September 2020: PPP Application and Forgiveness Updates](#)  
[August 2020: PPP Application and Forgiveness Updates](#)  
[July 2020: PPP Application and Forgiveness Updates](#)  
[June 2020: PPP Application and Forgiveness Updates](#)  
[May 2020: PPP Application and Forgiveness Updates](#)  
[April 2020: PPP Application and Forgiveness Updates](#)  
[March 2020: PPP Application and Forgiveness Updates](#)  
[February 2020: PPP Application and Forgiveness Updates](#)  
[January 2020: PPP Application and Forgiveness Updates](#)

**Hear the latest on the CPA Business Funding Portal on our live, semi-weekly PPP service update webinars:**  
Tuesdays & Thursdays at 10am ET

PPP Information

Portal Help

Semi-weekly webcast: important highlights and commentary

+

Registration & Archives

# Our Customer Care Teams

## Customer Service Managers

Email Support Available from 8AM-8PM ET  
[cpasupport@biz2credit.com](mailto:cpasupport@biz2credit.com)

CSRs are here to assist you with common “tier 1” support questions related to use of the loan portal as well as help direct you to additional customer care resources. CSRs are **NOT** able to expedite the funding process or clear SBA error/hold codes on applications.

- Status of applications
- Process workflow questions
- How to upload ACH/bank info

## Biz2Credit Funding Specialists

Assigned to applications in queue to facilitate funding process

***Please be patient with questions requiring funding specialist attention. The team is extremely busy and working as quickly as possible to address application requirements and process lending agreements. Expect one-way communication from funding specialists as they work through hundreds of applications each.***

- “More Information Needed” Status
- Loan amount discrepancies
- Delivery of loan agreement documents to borrowers

# Top Customer Support Inquiries

## **There is a discrepancy in the amount on my loan agreement vs my application, what do I do?**

**Issues with application qualification amounts will need to be retracted from the SBA system and resubmitted. This is a very specialized activity and requires a funding specialist's involvement to ensure the SBA system reflects correctly all application data that needs to be amended.**

**Any late-stage changes that are required to an application or a qualification amount will require significant processing time. Please be aware of this and advise clients accordingly.**

# Top Customer Support Inquiries

## **My client's application status is "Contract Pending" but they have not received the contract, what do I do?**

Contracts are generated and sent from DocuSign, Biz2Credit's third-party e-signature system. **Clients should always first check their inbox and junk folder for emails coming from [docusign.net](https://docusign.net).**

**If the client cannot find a loan agreement in their inbox, first ensure that you've allowed at least a 48-hour timeframe to elapse before reaching out.** Contracts are generated in batches due to extremely high processing volumes, and it can take time before your client has received the link, even if the contract is already generated (due to third-party system processing times).

**Once this timeframe has elapsed you or the client can reach out to the assigned funding specialist with a request for further information.** Funding specialists are handling large numbers of applications, so they will identify if any further requirements are outstanding which may have delayed contract generation, or else will work with the contracts team to advance the application. Your client will receive the DocuSign link shortly.

# Top Technology Support Inquiry

## How do I reset my password?

### Firm User Cannot Log-in:

- Super Admin can resend the email verification link.
- If user still does not receive after checking spam/junk folders, reach out to Tech support.

### Client Has Not Received Email To Access Their Profile:

- Client can go to biz2credit.com > click log in at top right > click “Forgot Password” (Email will be sent to client with further instructions.)
- If client received error with the provided email address, reach out to Tech support.

### CONTACT

**Email Biz2Credit Tech. Support at: [techhelp@biz2credit.com](mailto:techhelp@biz2credit.com)**

*Firms can also reach out to tech. support for portal access issues.*

**Before you contact support, see if your firm admin still needs to resend the verification link.**

# Customer Service & Communication Plan

## Contact Us

Service Inquiries about the Portal  
**email address on your portal**

PPP Guidance from AICPA  
[pcps@aicpa.org](mailto:pcps@aicpa.org)

Technical Issues (e.g. Login)  
[techhelp@biz2credit.com](mailto:techhelp@biz2credit.com)

## Find Resources

Check for frequent **emails** from  
[cpa@biz2credit.com](mailto: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