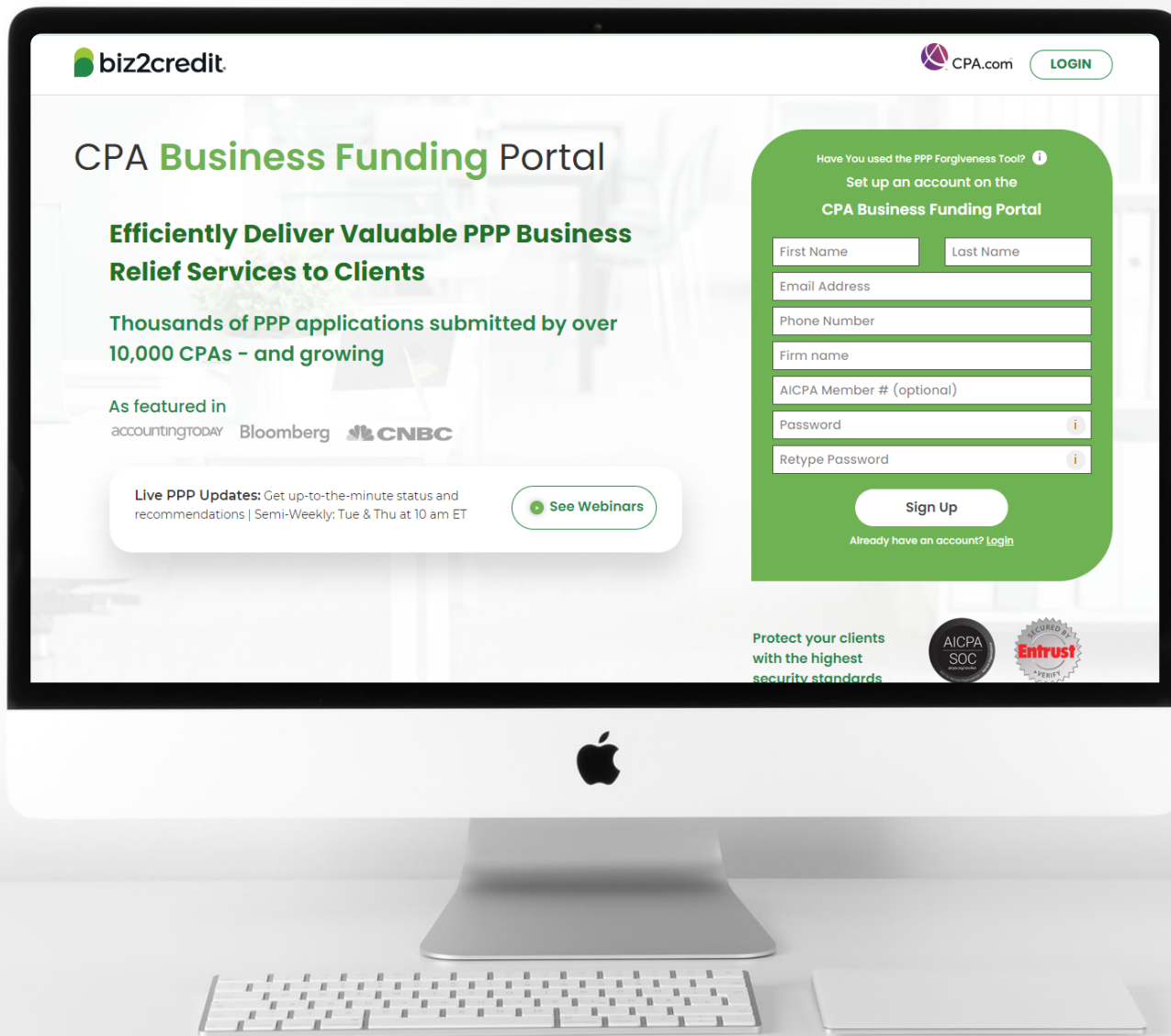




CPA **Business Funding** Portal

Live PPP Service Updates

March 23, 2021

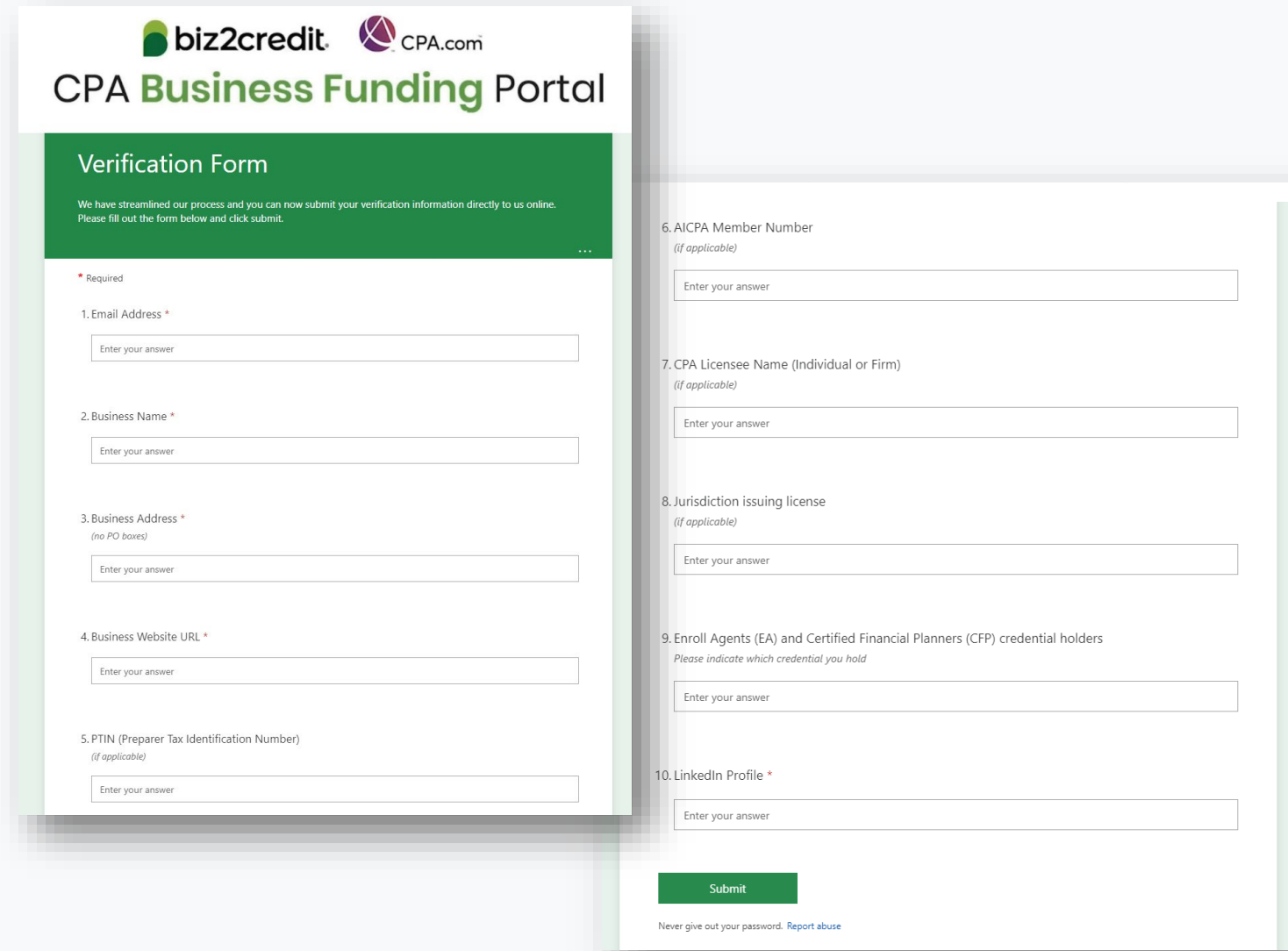


Customer Care Updates from the CPA Business Funding Portal Team

Training Tip: Firm Verification

Training tip

- Verification timeframe is 5-7 business days
- The Process for Current Subscribers:
 1. Complete verification form
> Access at: cpa.com/bfp-verification
 2. Once verified, a confirmation email will be sent to you

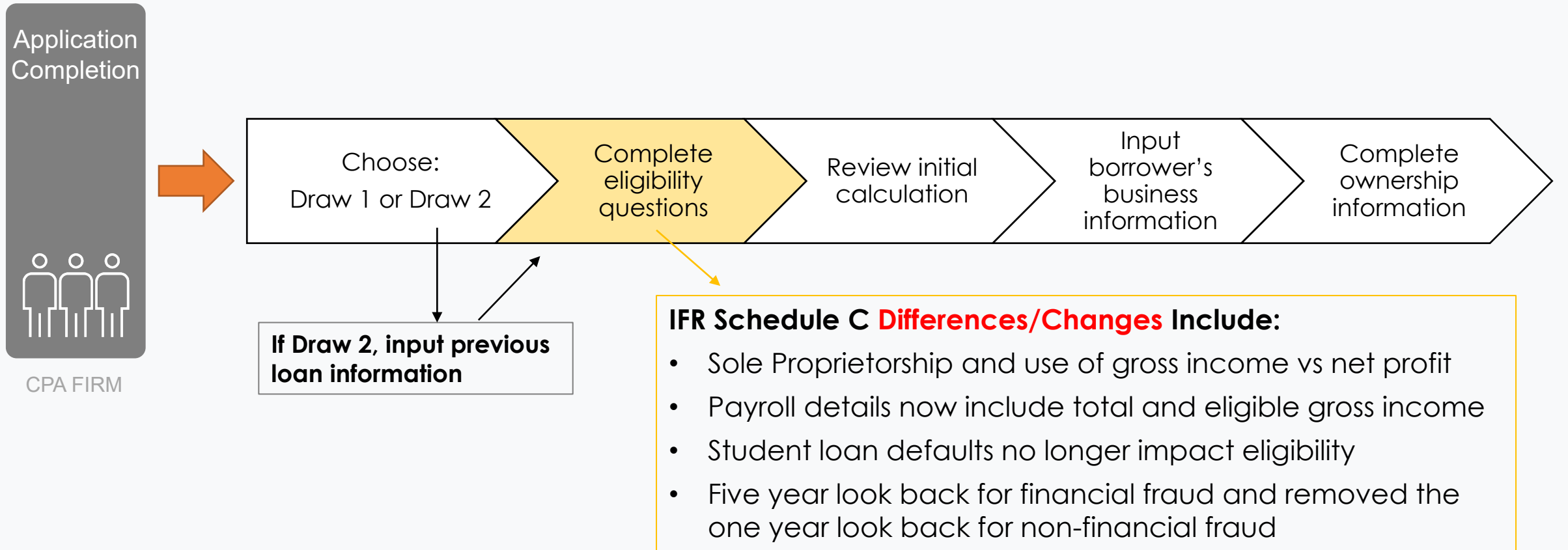


The screenshot displays the 'CPA Business Funding Portal' verification form. At the top, logos for 'biz2credit' and 'CPA.com' are visible. The form title is 'Verification Form'. A green banner contains the text: 'We have streamlined our process and you can now submit your verification information directly to us online. Please fill out the form below and click submit.' Below this, a list of required fields is shown, each with a text input box and a placeholder 'Enter your answer':

- 1. Email Address *
- 2. Business Name *
- 3. Business Address * (no PO boxes)
- 4. Business Website URL *
- 5. PTIN (Preparer Tax Identification Number) (if applicable)
- 6. AICPA Member Number (if applicable)
- 7. CPA Licensee Name (Individual or Firm) (if applicable)
- 8. Jurisdiction issuing license (if applicable)
- 9. Enroll Agents (EA) and Certified Financial Planners (CFP) credential holders (Please indicate which credential you hold)
- 10. LinkedIn Profile *

A green 'Submit' button is located at the bottom right. Below the button, a footer note reads: 'Never give out your password. [Report abuse](#)'.

Application Completion Process



Training Tip: Schedule C Submission Scenarios

Training tip

- **Pre-submission – No E-Tran#:** Borrower can withdrawal from the client facing portal
- **Post-submission – E-Tran #:** Manual Withdrawal Process from the SBA, submit request to support
- **Funded** – Borrower's will not have the ability to access additional funding.

Why it matters

For borrower's who have already completed a loan application, the new Schedule C changes may impact how they proceed.

It's important to understand where your client is at in the process. Based on that, you may take appropriate action to withdraw, and then complete and submit a new updated application to take advantage of the additional funding.

*Pre: E-Tran

Training Tip: Schedule C Platform Updates

Training tip

New platform updates have been added to address changes to the application completion under new rules for Schedule C

Why it matters

Borrowers may be eligible for increased loan amounts under new guidance. This is crucial to ensuring the maximum loan amount is received.

Go deeper

Resource to Reference:

<https://home.treasury.gov/system/files/136/PPP-IFR-Loan-Amount-Calculation-and-Eligibility.pdf>

The screenshot displays the 'Business Information' section of the CPA Business Funding Portal. At the top, there are navigation links for 'Dashboard' and 'Manage Users'. Below this, the section is titled 'Business Information'. A note states: 'This information is required by the government for your Paycheck Protection Program application. It is based on [SBA Form 2483-SD-C](#)'. The 'Industry (NAICS code)' is set to '11110 - Soybean Farming'. The 'What is the borrower's business legal structure?' dropdown menu is highlighted with a yellow box, showing 'Sole Proprietor' as the selected option. Below this, the 'Date of Establishment' is '02/13/1976'. The 'Employer Identification Number' is '44-4444444'. There is a checkbox for 'The borrower's business doesn't have an EIN' which is currently unchecked. The 'Is this business a franchise?' section has 'Yes' and 'No' radio buttons, with 'No' being selected. At the bottom, there are navigation arrows and a link for 'Economic Aid Act?'. The footer of the portal includes the 'biz2credit' logo, the 'CPA.com' logo, and the text 'CPA Business Funding Portal'.

Optimize your Business Funding Portal Experience

Join an onboarding session

When: Monday & Thursday, 2-3PM ET

Where: [Register here](#)

Stay informed

- Read the daily update emails
- Join the Bi-weekly AICPA Town Halls ([Register here for the April 1st event](#))
- Continue joining these semi-weekly webcasts

Use the resource hubs

- [CPA.com/PPPResources](https://cpa.com/pppresources)
- [CPALoanPortal.com/Resource-Hub](https://cpaloanportal.com/resource-hub)

Customer Care Reminders

Yodlee

Secure third-party software that provides read-only access to your client's bank account to the Biz2Credit funding platform.

Access via the link sent to you by a Biz2Credit Funding Specialist.

Responses from Customer Care...

... may be in your spam/junk folders. Please double-check if you have not received a response and are expecting one.

Withdraw requests for applications with an E-Tran

- Email cpasupport@hq.cpa.com with the following information:
 - ✓ Business name
 - ✓ Case ID
 - ✓ EIN
 - ✓ Client contact email
- **Note:** these requests may take **10+ days** to withdraw from the SBA

Resource Hubs

Visit either resource hub for information to help guide you through the second round of PPP

✓ **Helpful Portal resources for you and your clients, such as:**

- How-To Videos
- Access to FAQs (also found at: CPALoanPortal.com/#PPPFAQ)
- Required Documentation Guide
- ACH Tutorial and Detailed Guide

✓ **Semi-weekly webcast resources, such as:**

- Webinar replays
- Access to on-demand training clips and slides (*only* found at CPA.com/PPPResources)

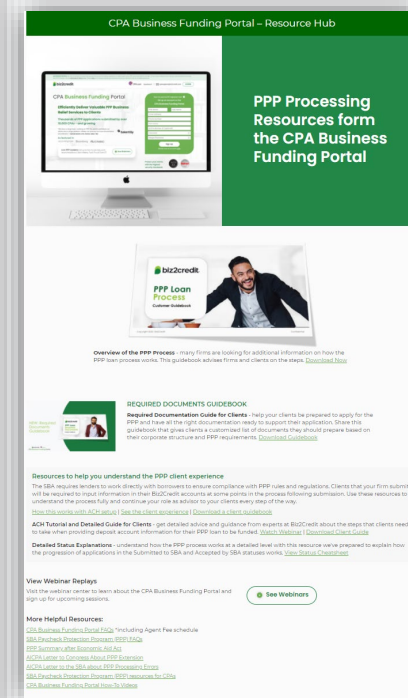
✓ **PPP Information, such as:**

- Recent news articles
- AICPA resources
 - SBA Paycheck Protection Program (PPP) FAQs
 - *PPP Summary after Economic Aid Act*

CPA.com/PPPResources



CPALoanPortal.com/Resource-Hub



Our Customer Care Teams

Customer Service Managers

Email Support Available from 8AM-8PM ET
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.

To ensure fastest response time, please include key information in your initial email:

- Business Name & Case ID (in subject line)
- Current Application Status
- Issue the application is experiencing
- *Helpful Hint:* Copy yourself when sending your request

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 errors and process lending agreements

Common documents you'll be asked to provide following SBA Acceptance:

- 2019/2020 payroll
- Driver License
- ACH/Voided Check
- Other additional documentation may be required

Customer Service & Communication Plan

Contact Us

Service Inquiries about the Portal
email address on your portal

CPA Business Funding Portal
Support
cpasupport@biz2credit.com

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