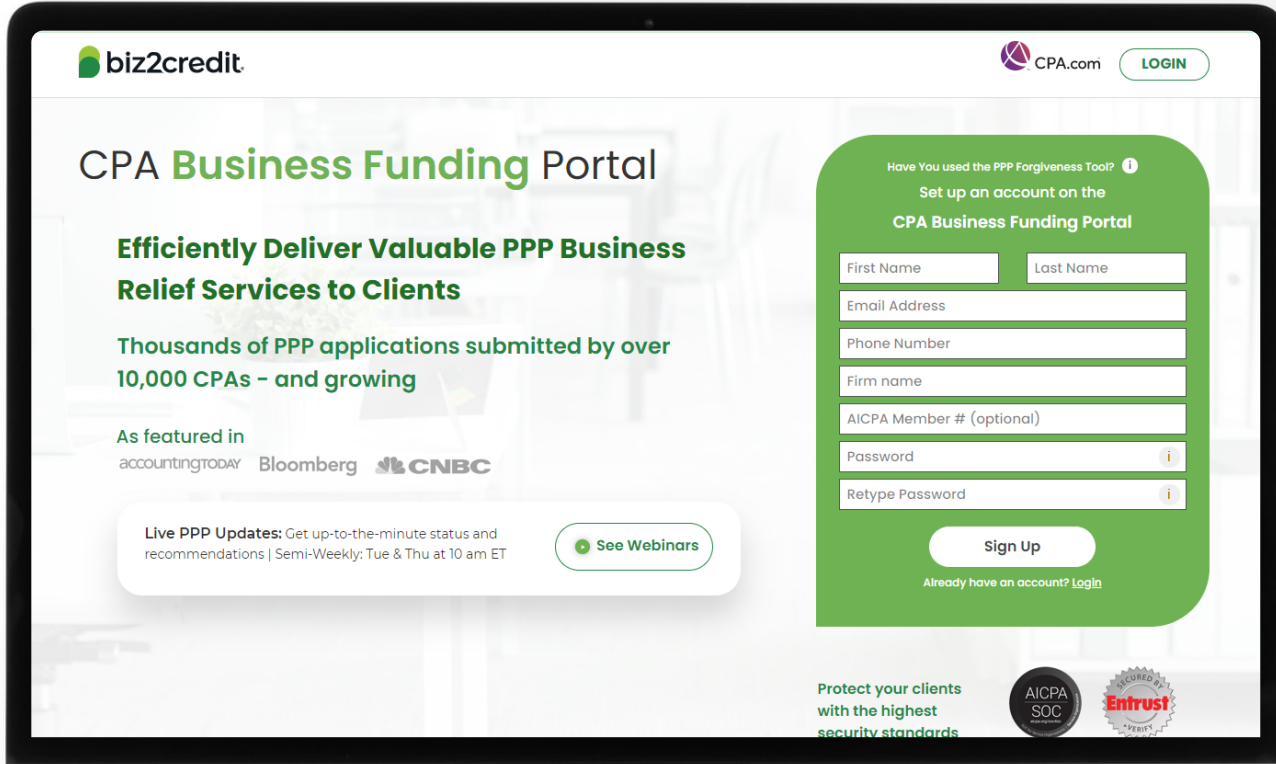**biz2credit** **CPA.com**

CPA Business Funding Portal

Live PPP Service Updates

March 16, 2021

biz2credit

CPA.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

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

AICPA SOC   Entrust

Operational Updates from the CPA Business Funding Portal Team

CPA Firm Verification Process

In accordance with efforts by the Small Business Administration (SBA) to prevent fraud in the Paycheck Protection Program, there are additional security features that have been implemented on the CPA Business Funding Portal.

Firms should send in the verification details requested in order to continue submitting PPP applications on the Portal.

Email the verification request form to verify@ hq.cpa.com. Please allow at least 3 business days for verification to complete.

Verification Form – CPA Business Funding Portal

1. Business name: _____
2. Business Address (no PO boxes): _____
3. Business Website URL: _____
4. PTIN (Preparer Tax Identification Number) (if applicable): _____
5. AICPA Member Number (if applicable): _____
6. CPA Licensee name (Individual or Firm) (if applicable): _____
   a. Jurisdiction issuing license [if applicable]: _____
7. For Enroll Agents (EA) and Certified Financial Planners (CFP) credential holders, please just indicate which credential you hold: _____
8. LinkedIn profile: _____

biz2credit • CPA.com
CPA Business Funding Portal

Updates to Your Experience

- New 2483 Forms (3.3 version)

- Error code messages on View Application page

- Sort dashboard by applications

- Updates to PPP forgiveness

- PCPS Pro Tips in PPP application process

- Add ACH details for clients (Paid subscribers)

- Status sync with client dashboard enhancements

- Resource hub now available

- New client dashboard views

- Updated status descriptions

- Loan amount & E-Tran on View Application page

- Schedule C Gross Income application workflow

Question & Answer

Enter Your Questions in the GoToWebinar Control Panel. Our team uses these questions to inform future resources and Live Service Update topics.

biz2credit® CPA.com
CPA **Business Funding** Portal

Summary and Key Takeaways

SBA Announcements

SBA updated rules are fully implemented in the CPA Business Funding Portal and now available for all users.

Applications for businesses with **20+ employees** have resumed on March 10.

Continue to watch for additional SBA updates.

New Features

Look for the ability to **add ACH details** on new PPP applications your firm is submitting

Check your firm's application **funnel report** for a picture of the processing status for your firm

Clients can now resolve many common **validation errors** by logging into their dashboard

Tips & Best Practices

Watch the recap videos available on CPA.com

CPA.com/PPPresources

Join us on Thursday at 10am ET

biz2credit CPA.com
CPA **Business Funding** Portal