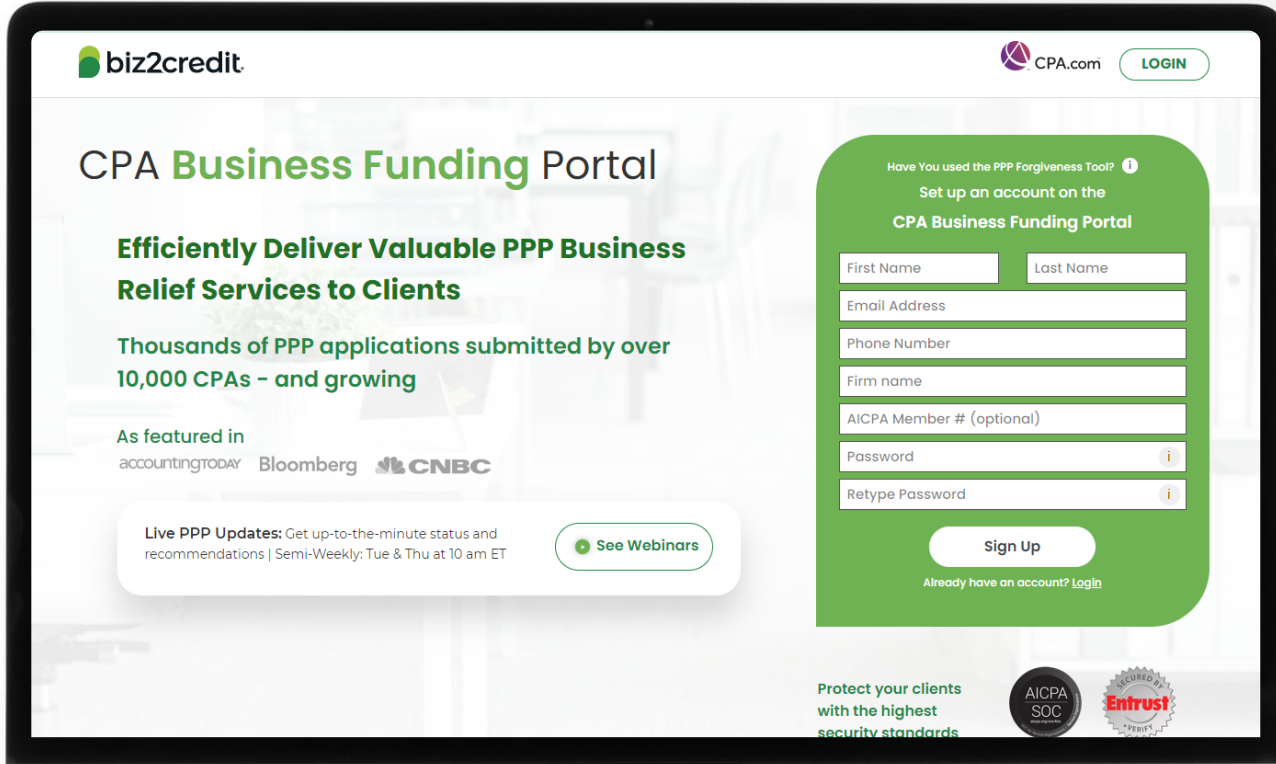




CPA **Business Funding** Portal

Live PPP Service Updates

March 18, 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



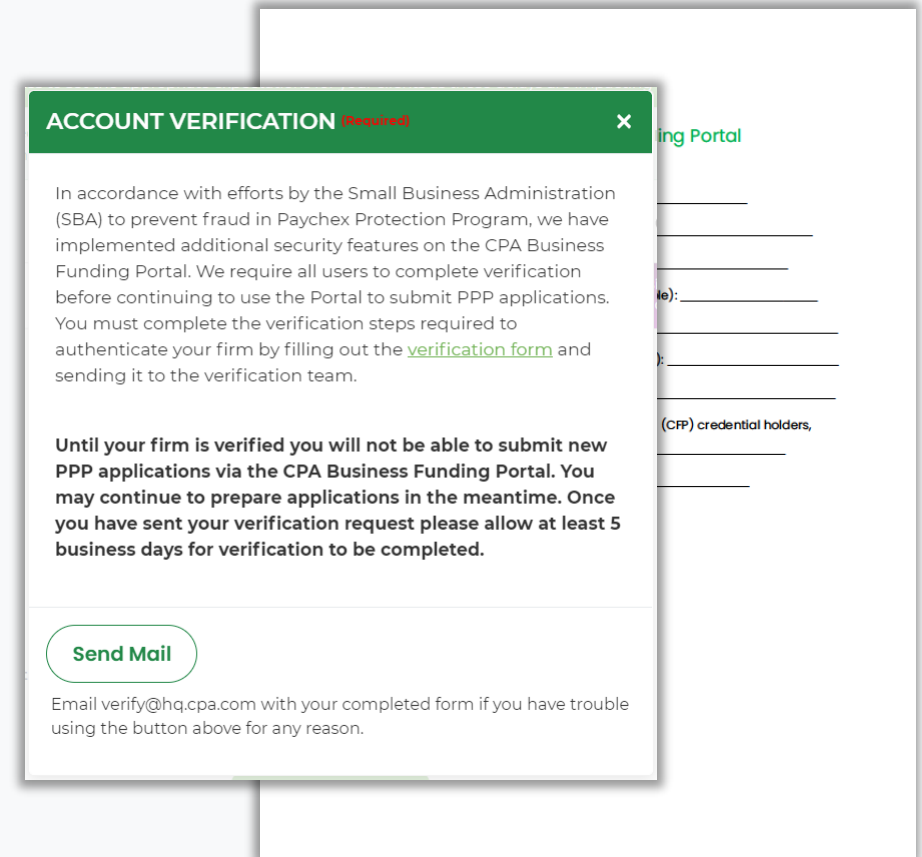
Operational Updates from the CPA Business Funding Portal Team

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 5 business days for verification to complete.



Sign up for New Firms Paused

New account sign-ups are temporarily paused.

Privileged access available for verified firms who have previously registered.

We are reaching out to firms who have been successful with the Portal so far in the program about new exclusive opportunities. Check your email for more information.

Information for AICPA Members ⓘ
New account sign-ups are temporarily closed.

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](#)

Timeline of Major Updates

**Feb. 24 –
March 10**



Pause for
SMBs +20
employees

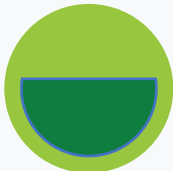


Error Code
Handling &
ACH Setup

March 8

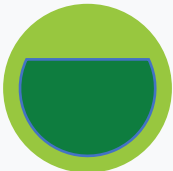


New SBA IFRs
& SBA Form
2483-C

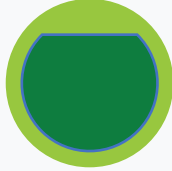


Increased
Verification

March 17

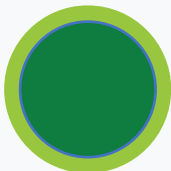


Pause on
New CPA
Accounts



2nd Draw for
2021 1st
Draw

March 31



PPP Forgiveness
Updates
(coming soon)

**Current Application
Deadline**

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.

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](https://cpa.com/PPPresources)

Join us on Tuesday at 10am ET