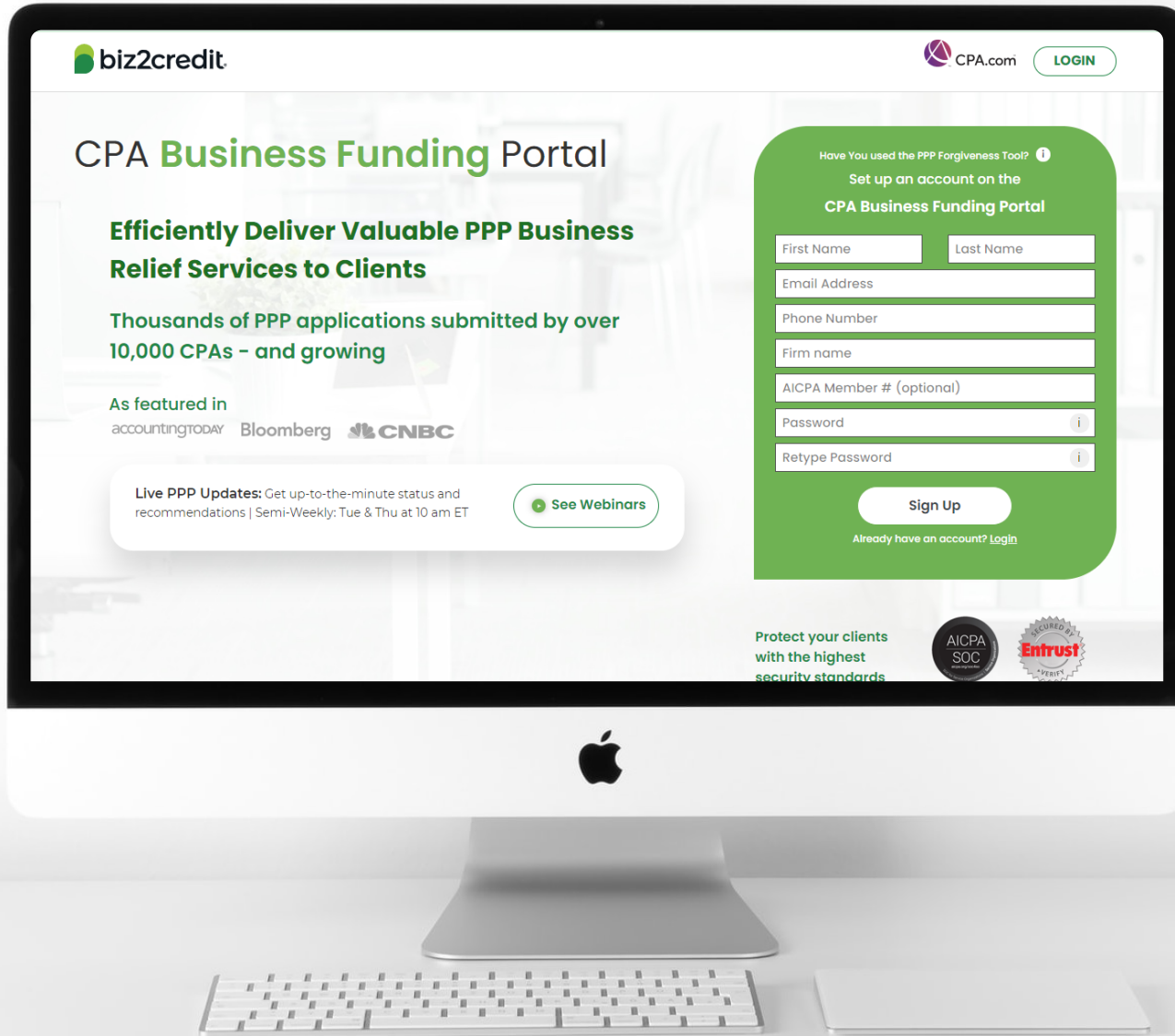




# CPA **Business Funding** Portal

Live PPP Service Updates

April 8, 2021



# Customer Care Updates from the CPA Business Funding Portal Team

# Second Draw for 2021 Borrowers

## Training tip:

Getting a 2nd Draw PPP Loan in 2021 – Applicants must:

- Have applied and been funded through Biz2Credit in Draw 1
- Certify funds from 1<sup>st</sup> Draw were used
  - Revenue reduction related documentation
  - Additional documentation for verification based on the application
- The client's business must have experienced a revenue reduction of 25% or greater due to the COVID-19 pandemic.

The screenshot shows the Biz2Credit dashboard for a client named 'Client 3003'. The dashboard includes a header with the Biz2Credit logo, navigation links (Dashboard, Manage Users), and a CPA.com partnership banner. The main section is titled 'Upload documents' and contains instructions for uploading documents for verification. Below this, there are two document upload sections: '2019 IRS Form 1040 Schedule C (0)' and '2020 IRS Form 941 for Quarter 1 OR Payroll statement covering 2/15/2020'. The '2020 IRS Form 941' section is highlighted with a red box. Below the document upload sections, there is a table with columns: Client Name, Client ID, Phone Number, Email Address, Existing Client Applications, and Action. The table lists two applications: 'Business 3003 Draw 1' (Funded) and 'Samsung Ltd.' (About borrower). The 'Samsung Ltd.' application has a red circle around the 'Apply for Draw 2' button in the 'Action' column. The 'Apply for Draw 2' button is also highlighted with a red circle. The text 'LOOK FOR THE 'APPLY FOR DRAW 2' BUTTON ON THE ORIGINAL 1ST DRAW APP IN YOUR APPLICATIONS DASHBOARD' is overlaid on the screenshot in green.

**LOOK FOR THE 'APPLY FOR DRAW 2' BUTTON ON THE ORIGINAL 1ST DRAW APP IN YOUR APPLICATIONS DASHBOARD**

Client Name	Client ID	Phone Number	Email Address	Existing Client Applications	Action
Client 3003	BIZ176047	(809) 808-8908	client3003@b2cdev.com	2	PPP, [icon], [icon]
Created on	Application Type	Business Name	Application ID	Application Stage	Action
Mar 30, 2021, 12:40:46 AM	PPP	Business 3003 Draw 1	APP18833	Funded ?	[icon], [icon]
Mar 30, 2021, 1:25:31 AM	Forgiveness	Samsung Ltd.	APP18834	About borrower	Start Forgiveness App, [icon], <b>Apply for Draw 2</b>
Contact 28031	BIZ175583	(687) 686-8686	contact28031@b2cdev.com	+	PPP, [icon]

# Schedule C Borrowers & Bank Accounts

## Training tip:

Due to challenges with the opening of a business-specific bank account during the pandemic, borrowers can include additional information on the application.

- A borrower can utilize the DBA (Doing Business As) field within the business information screen of the platform.
- Borrowers can put their name in the legal name field as this will correlate with the Schedule C being filed and use the DBA field for the business name.
- When the application reaches underwriting both the legal name and business name will be captured on the application.

**biz2credit**

Dashboard Manage Users

### Business Information

This information is required by the government for your Paycheck Protection Program application. It is based on [SBA Form 2483-SD-C](#)

Business legal name  
**Quantum, LLC**

☒ This business has another name (DBA or tradename)

DBA or tradename

Business phone no. ☐ Same as mobile no.

Business address City

State ZIP code

# 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 this afternoon's 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)

# 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](https://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](https://CPA.com/PPPResources)*)

✓ **PPP Information, such as:**

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




# Customer Care Reminders


## Top 3 Common Questions / Issues

1. Covered Period:
  - When the borrower receives funding, the covered period begins. This will impact forgiveness as the covered period dictates which costs are covered for forgiveness.
2. Voided Checks issues:
  - Blurred or pixelated and cannot be clearly read
  - Does not have the business name printed on the check
  - If obtaining voided check is an issue, provide a bank letter on official bank letterhead with routing and account numbers that match ACH
3. Addendum A or Addendum B was not provided although required based upon the application.

**Borrower's Bank Account Information (Optional):**

Please provide the borrower's bank account information so we can disburse funds if the loan is approved by SBA. The loan application still has to receive final verification and the borrower must complete the loan closing process before the borrower's business will receive funds.

Void Check (0)  Upload

Last Month's Bank Statement (0)  Upload


Bank Name



Business Name on Account

Account Number

Re-enter Account Number

Routing Number

 Save

# 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.**

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](mailto:cpasupport@biz2credit.com)

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 Tuesday at 10am ET