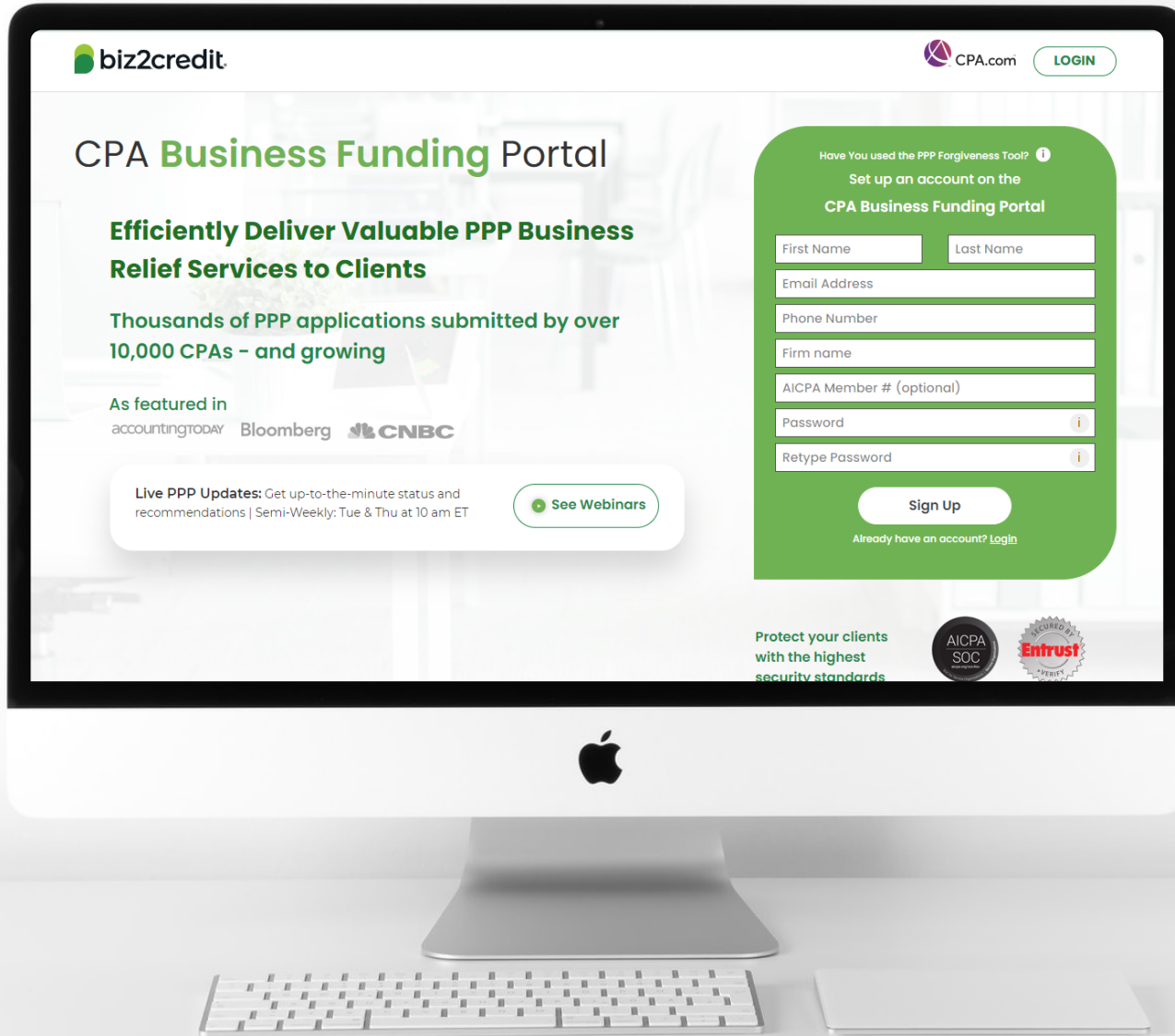




# CPA **Business Funding** Portal

Live PPP Service Updates

April 13, 2021



# Customer Care Updates from the CPA Business Funding Portal Team

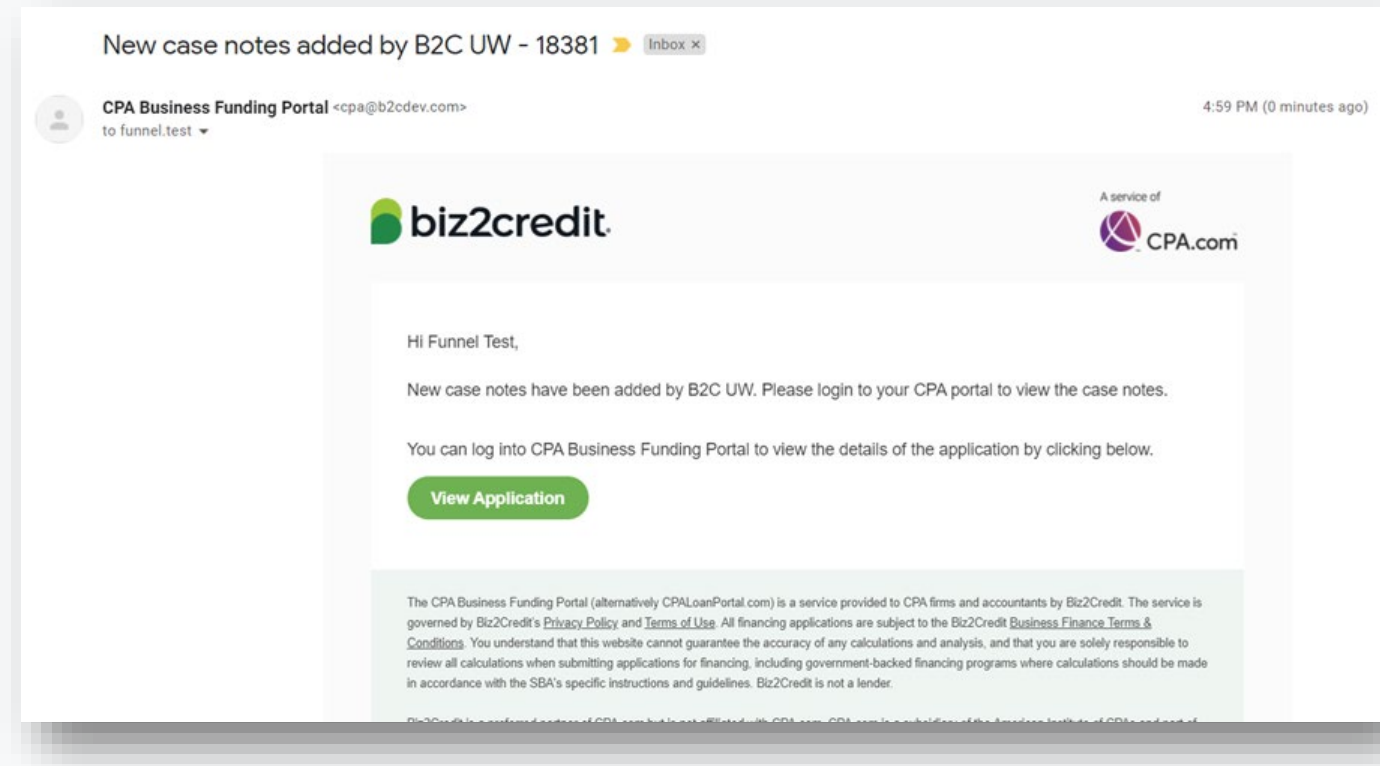
# Training Tip: Case Notes

## Training tip

- Email notifications will be sent to alert you to communications from the underwriting (UW) team.
- To access the new case notes either:
  - click the “view application” option in the email, or;
  - access the note via the portal

## Why it matters

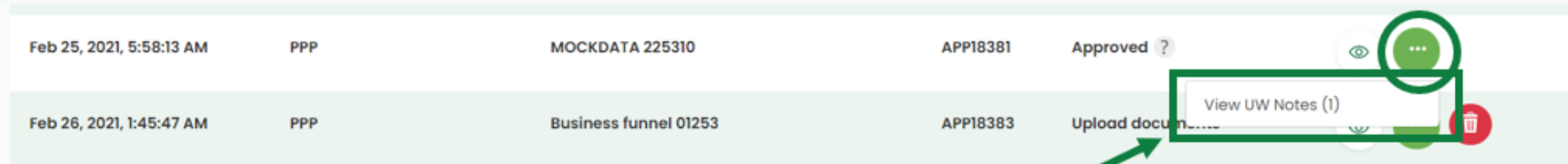
Firms can now collaborate more closely with the Biz2Credit funding team including direct communication with verification specialists via underwriting notes and the ability to upload additional documentation post-submission.








# Training Tip: UW Communication & Document Upload

## Training tip

- If the underwriter has left a note on the case, you will be able to view it on the dashboard under the application dropdown menu.



Feb 25, 2021, 5:58:13 AM	PPP	MOCKDATA 225310	APP18381	Approved ?	 
Feb 26, 2021, 1:45:47 AM	PPP	Business funnel 01253	APP18383	Upload document	  View UW Notes (1) 

Access the Underwriting Notes from the menu on each application that is in an Approved or More Information Needed status. **Available when notes are designated for firm review.**

# Training Tip: UW Communication & Document Upload

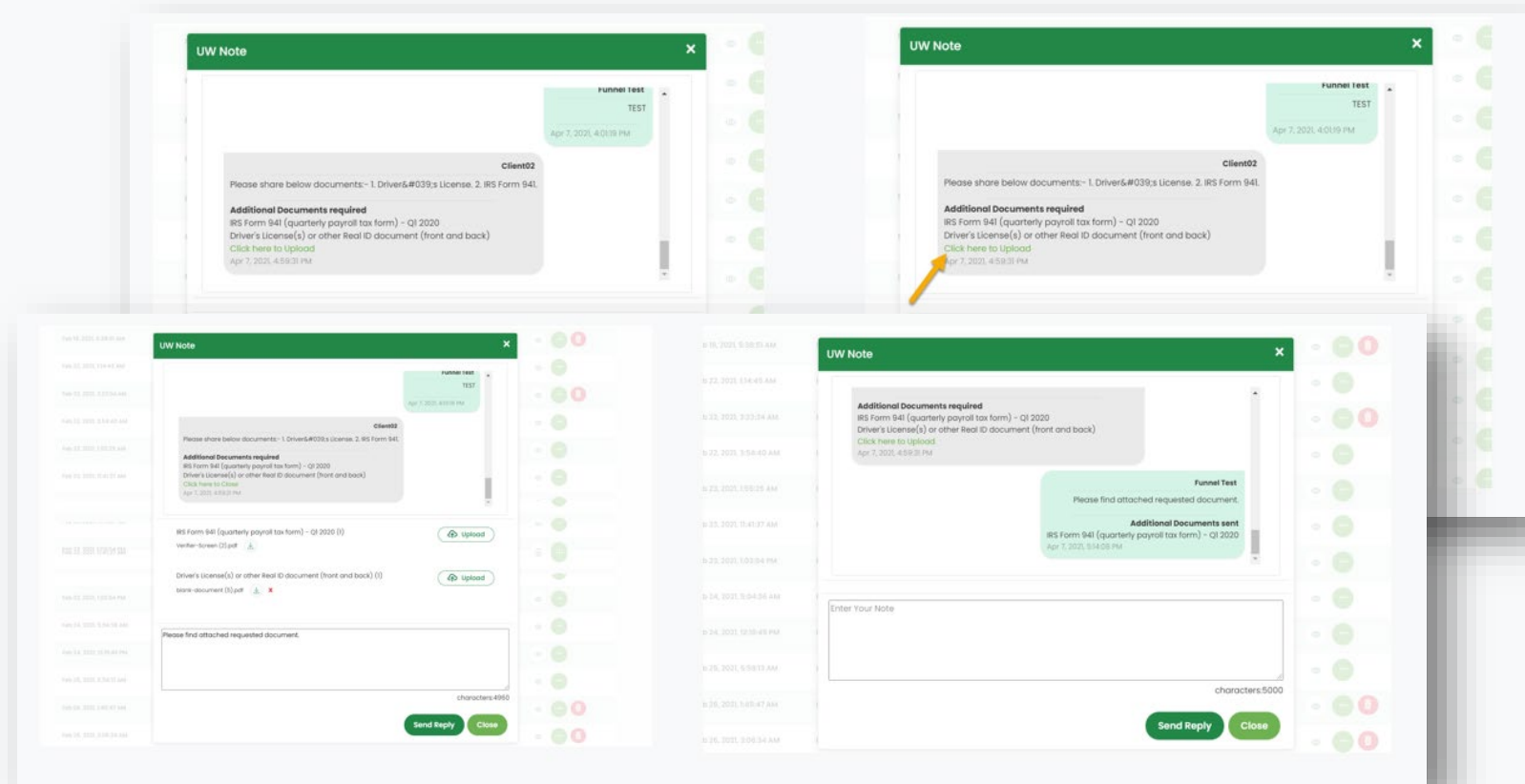
## Training tip

### Conversation Thread:

- You can respond to the underwriter for your application directly in the conversation window. The underwriter will indicate which additional document is requested

### Upload Required Documentation:

- You can upload the requested document directly in the conversation window, and your underwriter will receive the document in the system in real time



# PCPS Pro Tip: 2<sup>nd</sup> Draw loans for Sole Proprietors



## Pro Tip:

- ✓ Same guidance is applicable as all borrowers, including:
  - “...has used, or will use, the **full amount** of the First Draw PPP Loan **on or before the expected date** on which the Second Draw PPP Loan is disbursed to the borrower.”
- ✓ Covered periods **cannot** overlap
- ✓ **Maximum compensation is prorated for the length of the covered period**
  - For example, if the covered period of a first draw is 8 weeks to allow for a second draw, maximum compensation eligible for forgiveness is \$6,944 (\$20,833/24 weeks \* 8 weeks)

## Go Deeper:

- [AICPA PCPS Summary of PPP](#)
- [Interim Final Rule on Second Draw Loans](#)

# 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 22<sup>nd</sup> 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)*)

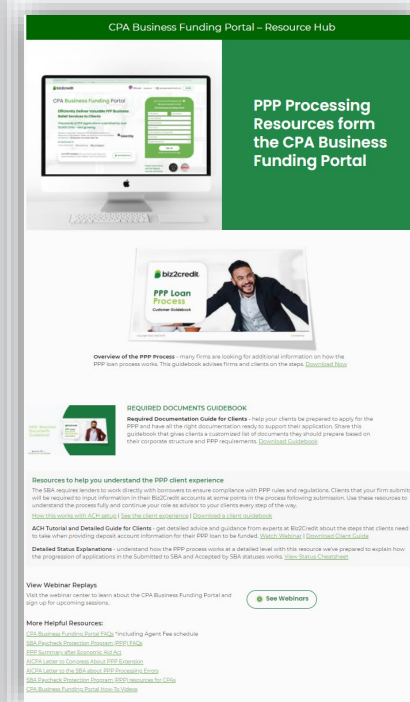
✓ **PPP Information, such as:**

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

CPA.com/PPPResources



CPALoanPortal.com/Resource-Hub



# Customer Care Reminders

## Underwriter Notes Shorthand Cheat sheet:

VC	Voided Check
BS	Bank Statement
FS	Financial Statement
DL	Drivers License
P&L	Profit & Loss
940/941	Client needs to provide Form 940/941 for all quarters
1040 Sch C	Need the filed copy
Feb 20	Client needs to provide complete month of February 2020 bank statement (Cannot be transactions from your online banking system, it must be the issued bank statement.)

## Yodlee and Small Banks:

If a small bank is not in Yodlee, the underwriter will try to use the alternative way for verification.

If failed, the funding specialist will request bank statements.

## Reminder:

Fields for Draw 2 applications must match Draw 1:

- Business name
- City
- State
- Business Address
- Draw 1 number

# 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 Thursday at 10am ET