CPA Business Funding Portal

Live PPP Service Updates

April 15, 2021

Customer Care Updates from the CPA Business Funding Portal Team

Training Tip: Application Processing

1 Application is *submitted* but there's no E-Tran number (Validation Error):

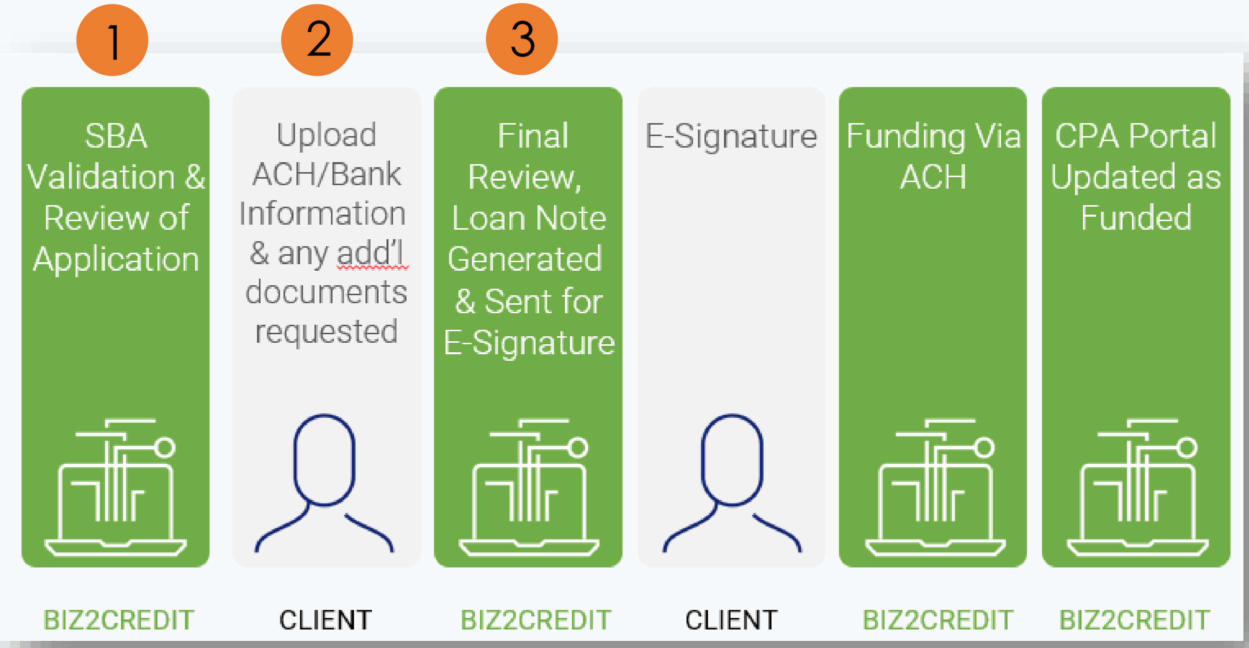
- Utilize the 'modify application' button, to make the appropriate changes, and then *resubmit* the application.
- If the button is not available, the application is part of the prioritization group that the biz2credit is working to resolve.

2 Application is *approved* with the status "More Info is Needed":

- Underwriter Notes are available within the system and a cheat sheet is available to help you help you identify what's needed. Access the UW notes from ellipsis (3 dots).
  - If notes are not available, please reach out to support at cpasupport@biz2credit.com

3 Application *status* is "Contract Sent" but the loan has been funded (Not triggered):

- Not showing agent fees or allowing a 2nd draw application.
- Resolution:
  - Confirm that the client has received the contract.
    - If the answer is 'yes', this is a backend issue.
  - Support intervention may be needed to resolve this issue, please reach out to cpasupport@biz2credit.com .



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Training Tip: 2nd Draw Applications

Training tip

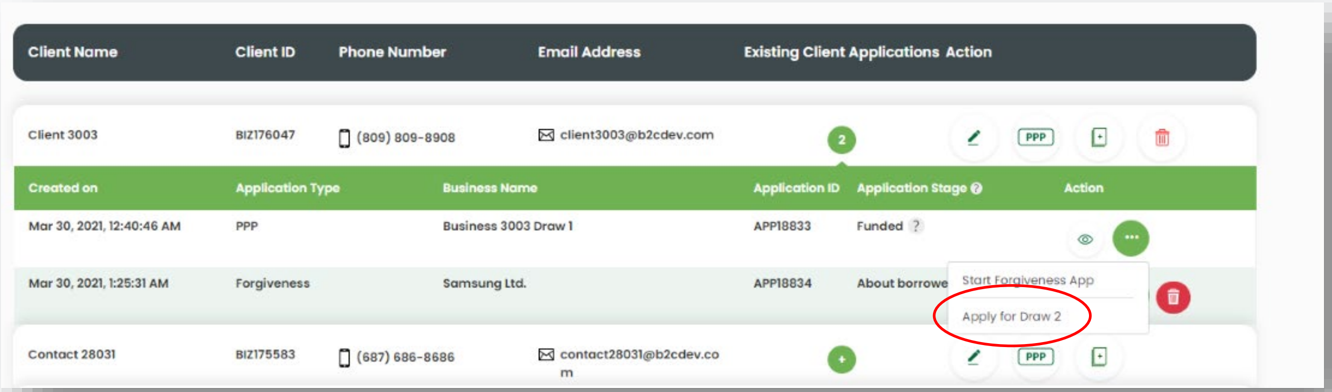
Getting a 2nd Draw PPP Loan in 2021 – Applicants must:

- Have applied and been funded through Biz2Credit in 1st Draw
- Certify funds from 1st Draw were used
  - Revenue reduction related documentation
  - Additional documentation for verification based on the application

Reminders

- Feature is available within the portal 1 week after 1st Draw is funded
- Information from the 1st Draw application should auto populate for the 2nd Draw application
  - Two possible scenarios for bank information

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



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 22nd event)**
- Continue joining these semi-weekly webcasts

Use the resource hubs

- 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

Resource Hubs

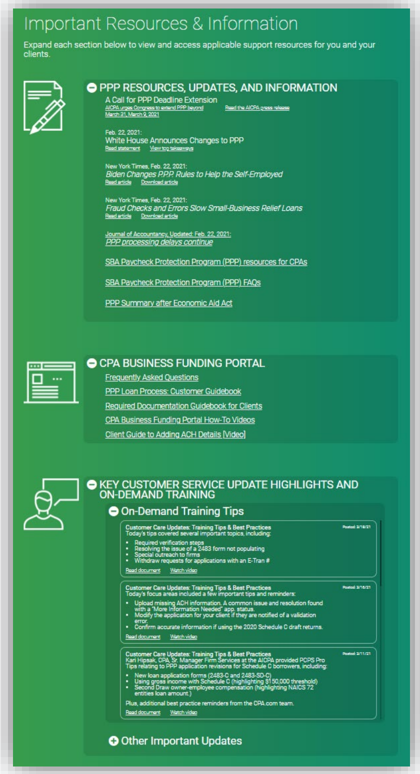
Visit either resource hub for information to help guide you through the second round of PPP

✓ **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

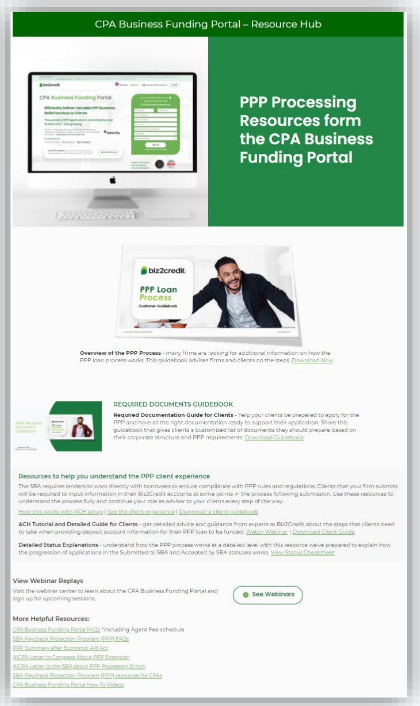
✓ **Semi-weekly webcast resources, such as:**
- Webinar replays
- Access to on-demand training clips and slides (*only* found at CPA.com/PPPResources)

✓ **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



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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 Tuesday at 10am ET