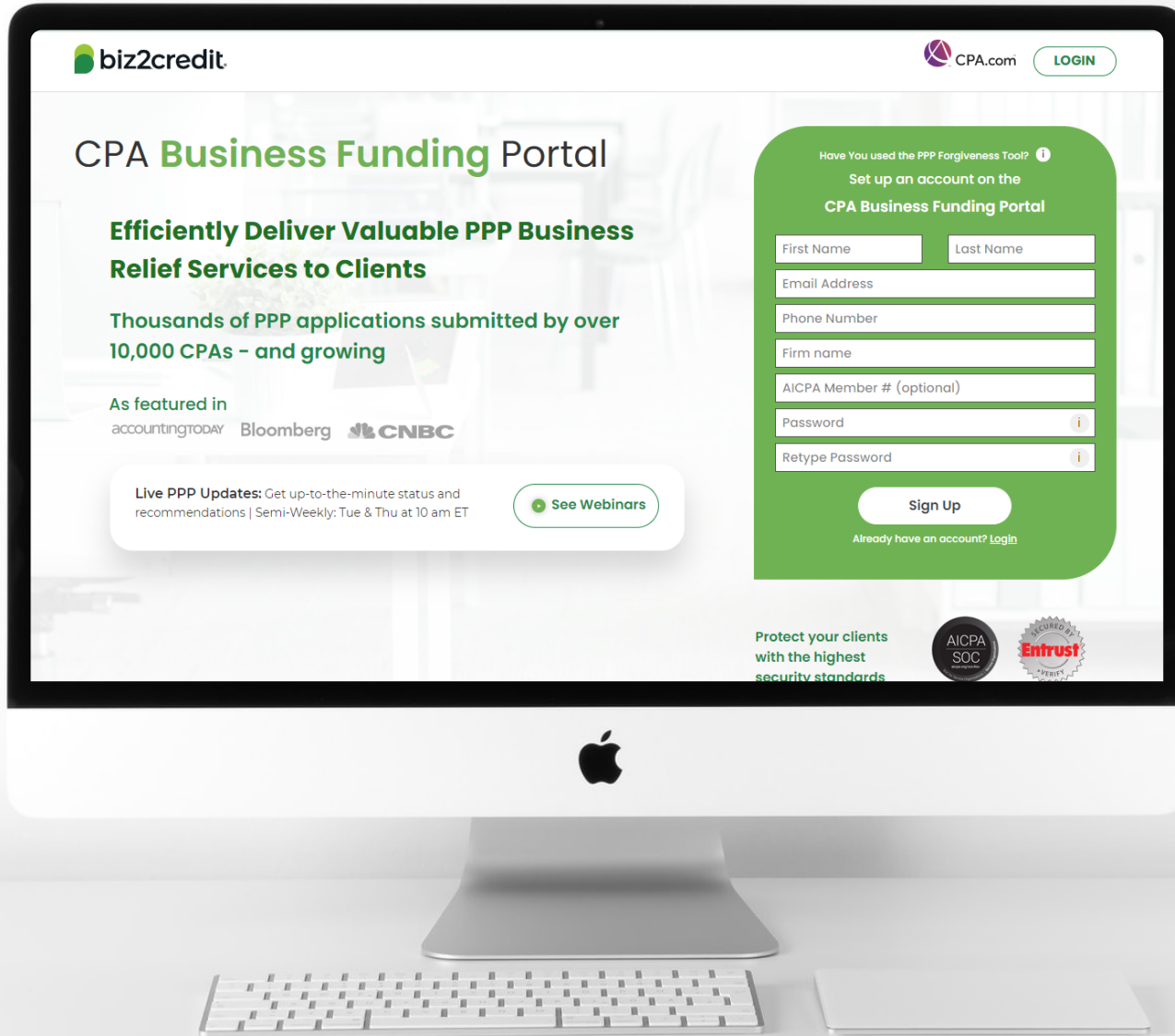




CPA **Business Funding** Portal

Live PPP Service Updates

April 8, 2021



Operational Updates from the CPA Business Funding Portal Team

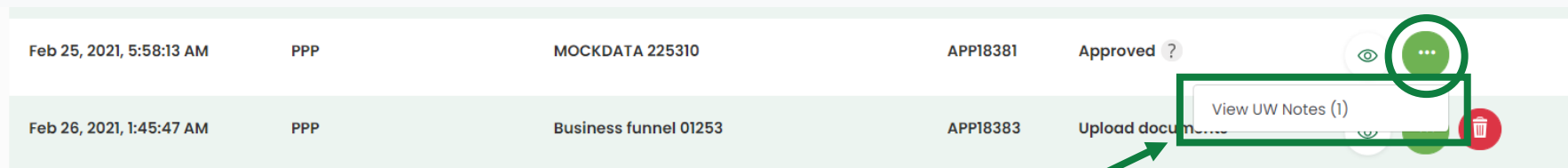
New Features to Facilitate App Review

Firms can now collaborate more closely with the Biz2Credit funding team. New features make it possible to communicate with verification specialists via underwriting notes and to upload additional documentation post-submission.

1

Underwriting (UW) Notes

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.



The screenshot shows a table with application details. The first row is highlighted in light green. A dropdown menu is open for the first row, showing 'View UW Notes (1)'. A green arrow points from the text below to the dropdown menu.

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

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.**

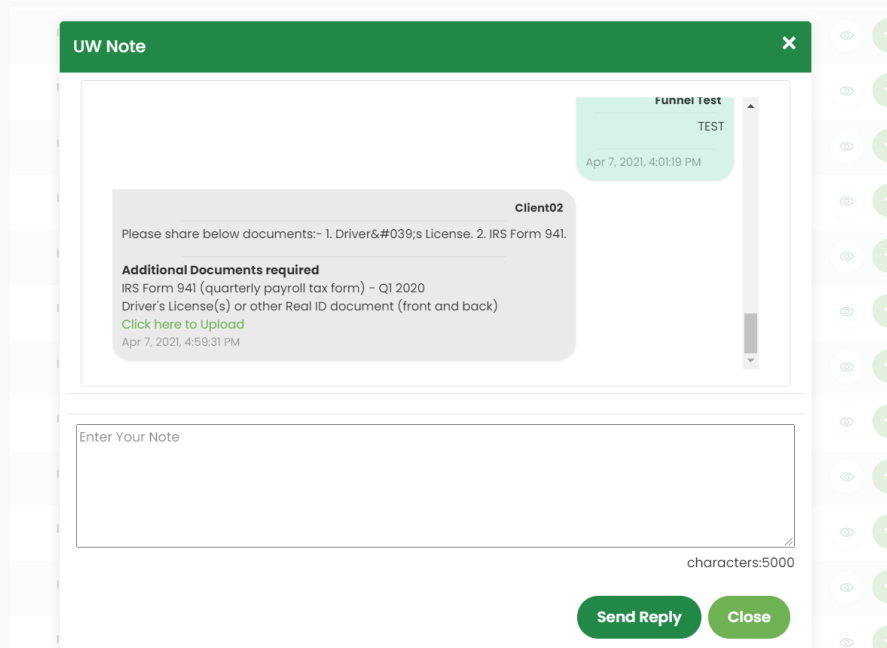
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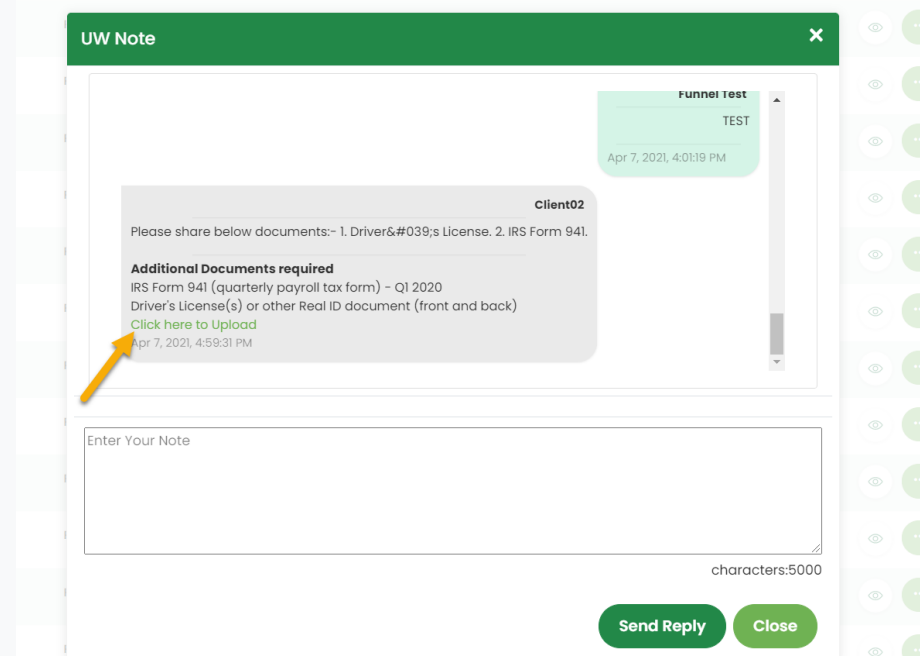
2

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.



The screenshot shows a 'UW Note' window with a green header and a close button. Inside, there's a message from 'Client02' dated 'Apr 7, 2021, 4:01:19 PM'. The message text is: 'Please share below documents:- 1. Driver's License. 2. IRS Form 941. Additional Documents required IRS Form 941 (quarterly payroll tax form) - Q1 2020 Driver's License(s) or other Real ID document (front and back) Click here to Upload Apr 7, 2021, 4:59:31 PM'. Below the message is a text input field labeled 'Enter Your Note' with a character count of 5000. At the bottom are 'Send Reply' and 'Close' buttons.



This screenshot is identical to the previous one, but with an orange arrow pointing to the 'Click here to Upload' link in the message text. The 'UW Note' window structure, including the header, message content, input field, and buttons, remains the same.

New Features to Facilitate App Review

Firms can now collaborate more closely with the Biz2Credit funding team. New features make it possible to communicate with verification specialists via underwriting notes and to upload additional documentation post-submission.

3

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.

The screenshot shows a conversation window on the left with a list of messages. The main area displays a 'UW Note' (Underwriting Note) from 'client02' dated Apr 7, 2021, 4:03:39 PM. The note contains the text: 'Please share below documents:- 1. Driver's License, 2. IRS Form 941, Additional Documents required IRS Form 941 (quarterly payroll tax form) - Q1 2020 Driver's License(s) or other Real ID document (front and back) Click here to Upload Apr 7, 2021, 4:59:31 PM'. Below the note, there are two document entries: 'IRS Form 941 (quarterly payroll tax form) - Q1 2020 (1)' with a download icon, and 'Driver's License(s) or other Real ID document (front and back) (1)' with a download icon and a red 'X' icon. At the bottom, there is a text input field with the placeholder 'Please find attached requested document.' and a character count of 4960. The 'Send Reply' and 'Close' buttons are at the bottom right.

The screenshot shows a conversation window on the left with a list of messages. The main area displays a 'UW Note' (Underwriting Note) from 'client02' dated Apr 7, 2021, 4:59:31 PM. The note contains the text: 'Additional Documents required IRS Form 941 (quarterly payroll tax form) - Q1 2020 Driver's License(s) or other Real ID document (front and back) Click here to Upload Apr 7, 2021, 4:59:31 PM'. Below the note, there is a text input field with the placeholder 'Please find attached requested document.' and a character count of 5000. The 'Send Reply' and 'Close' buttons are at the bottom right.

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.

Deadline now extended to **May 31**.

Watch for updates about SBA funding for the program – approximately \$60 billion remains.

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