biz2credit CPA.com CPA Business Funding Portal Live PPP Service Updates





Operational Updates from the CPA Business Funding Portal Team

PPP Firm to Lender Workflow



Lender or SBA returns application for more information

(Process could take days to weeks)



PPP Processing Timeline

Minutes	Minimum48 hrs	Up to 10 days	Up to 10 days	About About
Complete the Government Declarations and eSign sent by the client's CPA firm.	Submission into SBA and timeframe for SBA decision to be made is no less than 48 hours.	Client's application is approved and the final verification process begins. Client must provide ACH details and any outstanding	Loan agreement is generated and sent to the client for eSign. Approximate processing times are 12-14 business	Funds are sent to the client's account via ACH or wire transfer. Processing may take around 48 hours.
CPA Business Funding Portal	Biz2Credit Account	documents or clarifications during this time.	days right now.	Client's Bank Account
ACH Details	Submission Status	Underwriter Notes	CPA	biz2credit Scpa.com

Additional Verification Steps

As we take action to ensure the CPA Business Funding Portal is used to generate and submit verified applications, our teams may be reaching out to you and your clients for some further documentation to complete this necessary due diligence.

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IRS Form 1040 (Tax Return)

Online Account Verification



Bank Statement

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RETUR	N SERVICE REQUESTED	1	Ma	naging You	Ir Accoun	nts
			Ê	Primary Branch	Canton	
John D	oe .		1	Phone Number	443-573-4800	
123 Ma Balitten	In Street		(1)	Online Banking	HowardBank	com
	10		6	Telephone	1-877-527-27	03
			õ	Mailon Address	3301 Boston S	Street
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Commission Report – Accessing the Report

As more applications are funded, firms can view their Commission Report under "My Plan" page.

Click on "My Plan" button on the dashboard (Firm Admin only)



Commission Report – View & Export Report

You will be able to view the details of the applications that have been funded as well as your commission for each application.



Commission Report – Bank Account Info

A bank account is required to ensure timely payment of the commissions. You can provide your bank account information by clicking on the "Add Account" button below the commission report.

Setup Bank Accounts to Receive Payments- The commissions due to your firm will be deposited at the conclusion of the program. Add your firm's bank account details below to ensure you receive timely payment of commissions. If you do not add your account details payment may be delayed.





Your bank account information will be saved in the portal and it will be the account where the commissions will be deposited.

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 \$50 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

Join us on Thursday at 10am ET

biz2credit CPA.com CPA Business Funding Portal