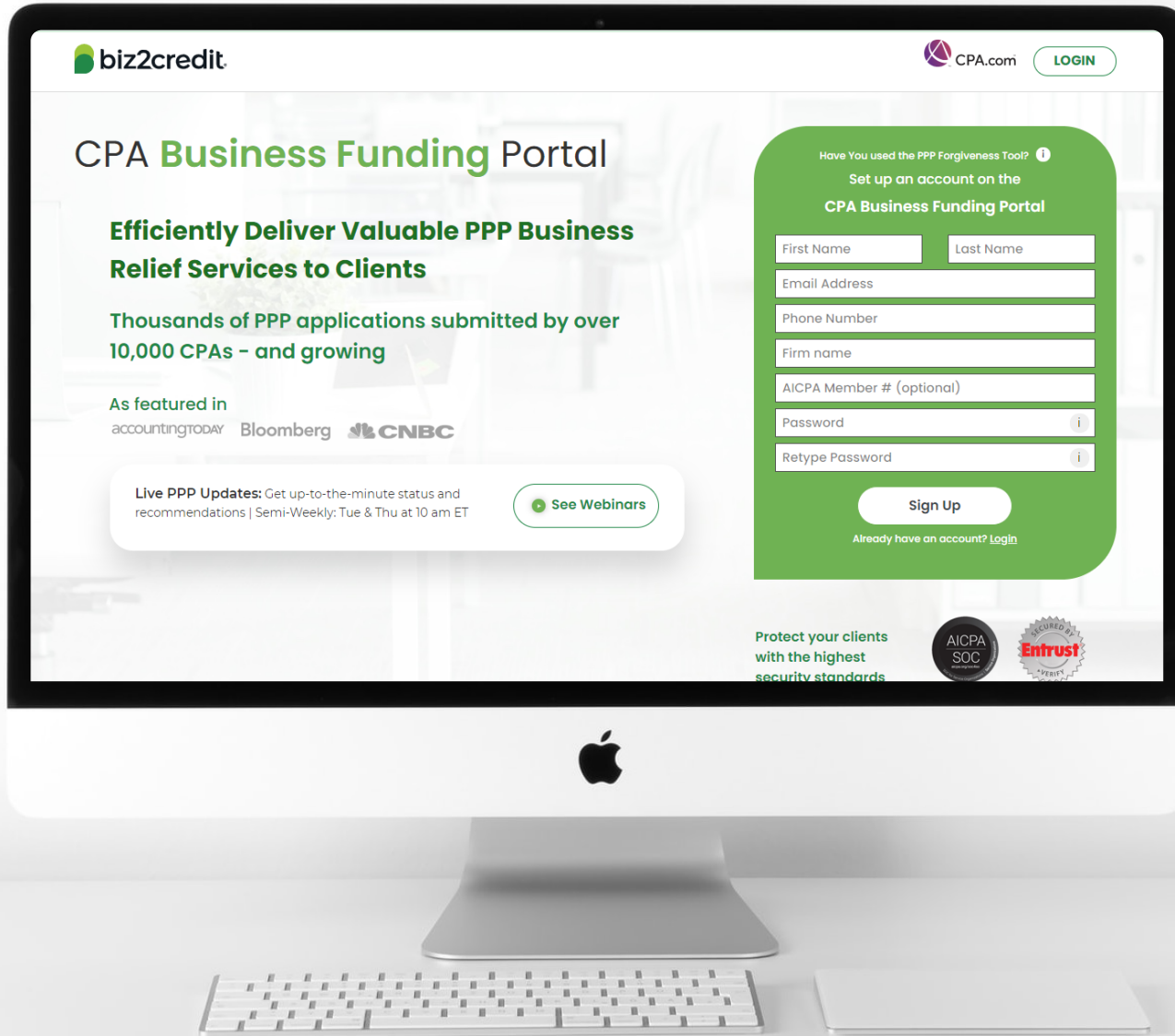




CPA **Business Funding** Portal

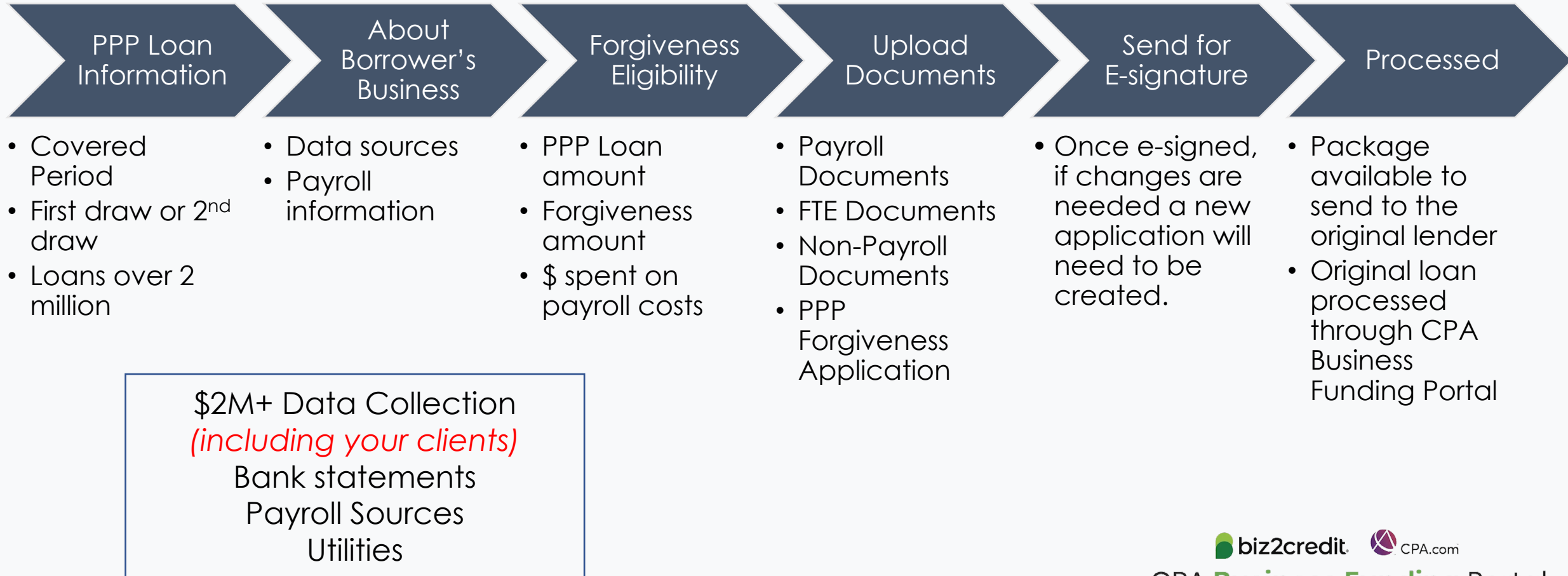
Live PPP Service Updates

May 6, 2021



Customer Care Updates from the CPA Business Funding Portal Team

Forgiveness Application Journey



Training Tip: Docs Required for < \$150K

Training tip

The following documentation is required for forgiveness applications less than \$150k:

- Payroll Documents
- FTE
- Non-payroll
- Additional documents

Form 3508S will auto populate in step 5 of the process and then send to the client for e-signature.

Proceed to next step for complete application

- Package available to send to the original lender
- Submit directly if original loan was processed through CPA Business Funding Portal

The screenshot displays the 'Upload Additional Required Documents' interface. It is organized into five numbered sections, each with a list of documents and an 'Upload' button. Section 1, 'Payroll documents', includes Banking Statements (0), Payroll reports OR tax forms (IRS 941) for the period that overlaps covered period (0), and Payments receipts, cancelled checks, or account statements documenting the amount of ant employer contributions to employee health insurance and retirement plans (0). Section 2, 'FTE documents', includes Document showing average number of FTEs employed between Feb 15,2019 and Jun (0) and Documents showing average number of FTEs employed between Jan 01,2020 and Feb 29,2020 (0). Section 3, 'Non payroll documents', includes Business mortgage interest payments (0), Business rent or lease payments (0), and Business utility payments (0). Section 4, 'Additional Documents', is highlighted with an orange border and includes Operations Expenditures receipts for Covered Period (0), Property Damage costs receipts for Covered Period (0), Supplier costs receipts for Covered Period (0), and Protection Expenditures for Covered Period (0). Section 5, 'PPP forgiveness application form', includes Form 3508 and has buttons for 'View', 'Send For E-Sign', and 'Regenerate 3508'. On the right side, there is an 'Application Progress' section with a vertical list of steps: PPP loan information, About borrower's business, Forgiveness eligibility, and Upload documents (which is currently active). Below this is a 'AICPA PCPS Pro Tip' box with text about the AICPA's Private Companies Practice Section (PCPS) offering valuable insights on key areas of the Paycheck Protection Program (PPP) and the loan forgiveness application by using the latest guidance from the Treasury and Small Business Administration (SBA). Learn more about PCPS at aicpa.org/pcps.

PCPS Pro Tip: Forgiveness Calculators



Best practices for using the loan forgiveness calculator

- Loan forgiveness applications less than \$150k will use Form 3058S Loan Forgiveness Calculator
- Loan forgiveness applications greater than \$150k will use the AICPA Loan Forgiveness Calculator

If 3508 is required, the borrower will have options for how to enter all the required data:

- Input the data directly in the platform
- Leverage the AICPA Loan Forgiveness Calculator
 - Calculator can be uploaded to the portal
 - This will map the information from the calculator to the platform

Go Deeper:

- [Additional resources for loan forgiveness applications & instructions](#)
- [SBA FAQs on Loan Forgiveness](#)

Please read all the instructions as there are functionality tips and tricks provided to assist

Optimize your Business Funding Portal Experience

Join a best practice session

When: Thursdays, 2-3PM ET

Where: [Register here](#)

Stay informed

- Read the daily update emails
- Join the Bi-weekly AICPA Town Halls ([Register here for today's event, May 6th](#))
- Continue joining these semi-weekly webcasts

Use the resource hubs

- [CPA.com/PPPResources](https://cpa.com/PPPResources)
- CPALoanPortal.com/Resource-Hub

Customer Care Reminders

Contact Support for DocuSign Help

If your client needs loan documents (DocuSign) re-sent, contact cpasupport@biz2credit.com with:

1. Client name
2. Case ID number

Reasons for a new loan document request could include:

- ✓ You recently received a special communication about helping to resolve borrower-dependent actions on applications that are approved and waiting for borrower signature
- ✓ Email was never received
- ✓ DocuSign link expired

If your client has signed their loan documents and you do not feel it is advancing, contact cpasupport@biz2credit.com with:

1. Client name
2. Case ID number
3. Copy of signed contract

Yodlee, Trouble Shooting

- If your clients' bank will not or cannot connect to Yodlee, take these steps:
 - Reach out to underwriting (UW) or your Funding Specialist and ask for a link to DecisionLogic.
(Please cc: cpasupport@biz2credit.com with your request.)
 - Upload the 3 most current bank statements and proof of business prior to 2/15/2020.

Customer Care Reminders

Underwriting (UW) Notes

Email notifications will be sent to alert you to underwriting (UW) notes.

To access the new case notes either:





- click the “view application” option in the email, or;
- access the note via the portal

Important Reminders:

- *Not all applications will have UW notes.*
- *Underwriters may not immediately respond.*

If you do not see UW notes in your Portal but would like to know what additional information is needed, please:

- Check back the following day
- Email support with:
 - Case ID
 - Legal Business Name
 - Current Status
 - Including if new information was uploaded

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)

UW Note

Funnel test
TEST
Apr 7, 2021, 4:01:19 PM

Client02

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

Enter Your Note


UW Note


Funnel test
TEST
Apr 7, 2021, 4:01:19 PM

Client02

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

IRS Form 941 (quarterly payroll tax form) - Q1 2020 (1)
Verifier-Screen (2).pdf 

Driver's License(s) or other Real ID document (front and back) (1)
blank-document (5).pdf 

Please find attached requested document.

characters:4960

[Send Reply](#) [Close](#)

UW Note

Funnel test
TEST
Apr 7, 2021, 4:01:19 PM

Client02

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

Funnel Test
Please find attached requested document.

Additional Documents sent
IRS Form 941 (quarterly payroll tax form) - Q1 2020
Apr 7, 2021, 5:14:06 PM

Enter Your Note

characters:5000

[Send Reply](#) [Close](#)

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*



Our Customer Care Teams

Customer Service Managers

Email Support Available: 8am – 8pm ET
cpasupport@biz2credit.com

Biz2Credit Funding Specialists

Assigned to applications in queue to facilitate funding process

"Special Requests"

Assistance with other inquiries CSRs and FSs cannot help with.

Frequent CSR Help items:

- Yodlee link re-set requests
- Assistance when no underwriter notes (UW) available & "More Information Needed" status
- Withdraw requests
- Program changes for Schedule C borrowers
- General application status inquiries

Frequent FS Help items:

- Yodlee alternative verification method requests (ex. DecisionLogic)
- Loan amount discrepancies

Reach out to these specific contacts:

- Technical Issues (e.g. Login)
 - Email: techhelp@biz2credit.com
- DocuSign link expires, email:
 - Funding Specialist, signature@biz2credit.com, and info@biz2credit.com

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