# CPA Business Funding Portal

## Live PPP Service Updates

May 6, 2021

# Customer Care Updates from the CPA Business Funding Portal Team

# Forgiveness Application Journey

### PPP Loan Information
- Covered Period
- First draw or 2nd draw
- Loans over 2 million

### About Borrower's Business
- Data sources
- Payroll information

### Forgiveness Eligibility
- PPP Loan amount
- Forgiveness amount
- $ spent on payroll costs

### Upload Documents
- Payroll Documents
- FTE Documents
- Non-Payroll Documents
- PPP Forgiveness Application

### Send for E-signature
- Once e-signed, if changes are needed a new application will need to be created.

### Processed
- Package available to send to the original lender
- Original loan processed through CPA Business Funding Portal

$2M+ Data Collection
*(including your clients)*
Bank statements
Payroll Sources
Utilities

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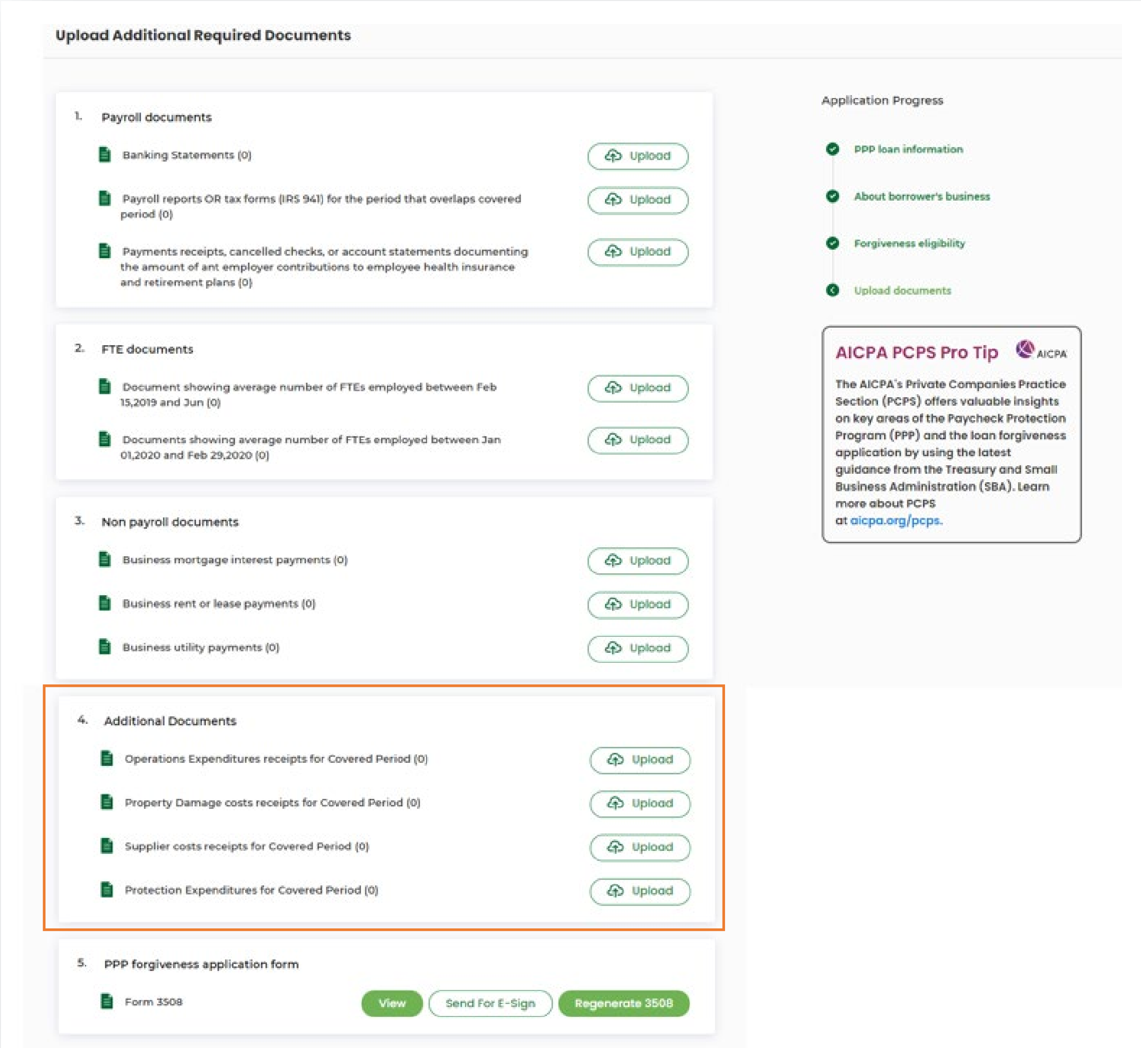
CPA **Business Funding** Portal

# **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

# **PCPS Pro Tip:** Forgiveness Calculators

Go Deeper:

- Additional resources for loan forgiveness applications & instructions
- SBA FAQs on Loan Forgiveness

**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

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
- 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:

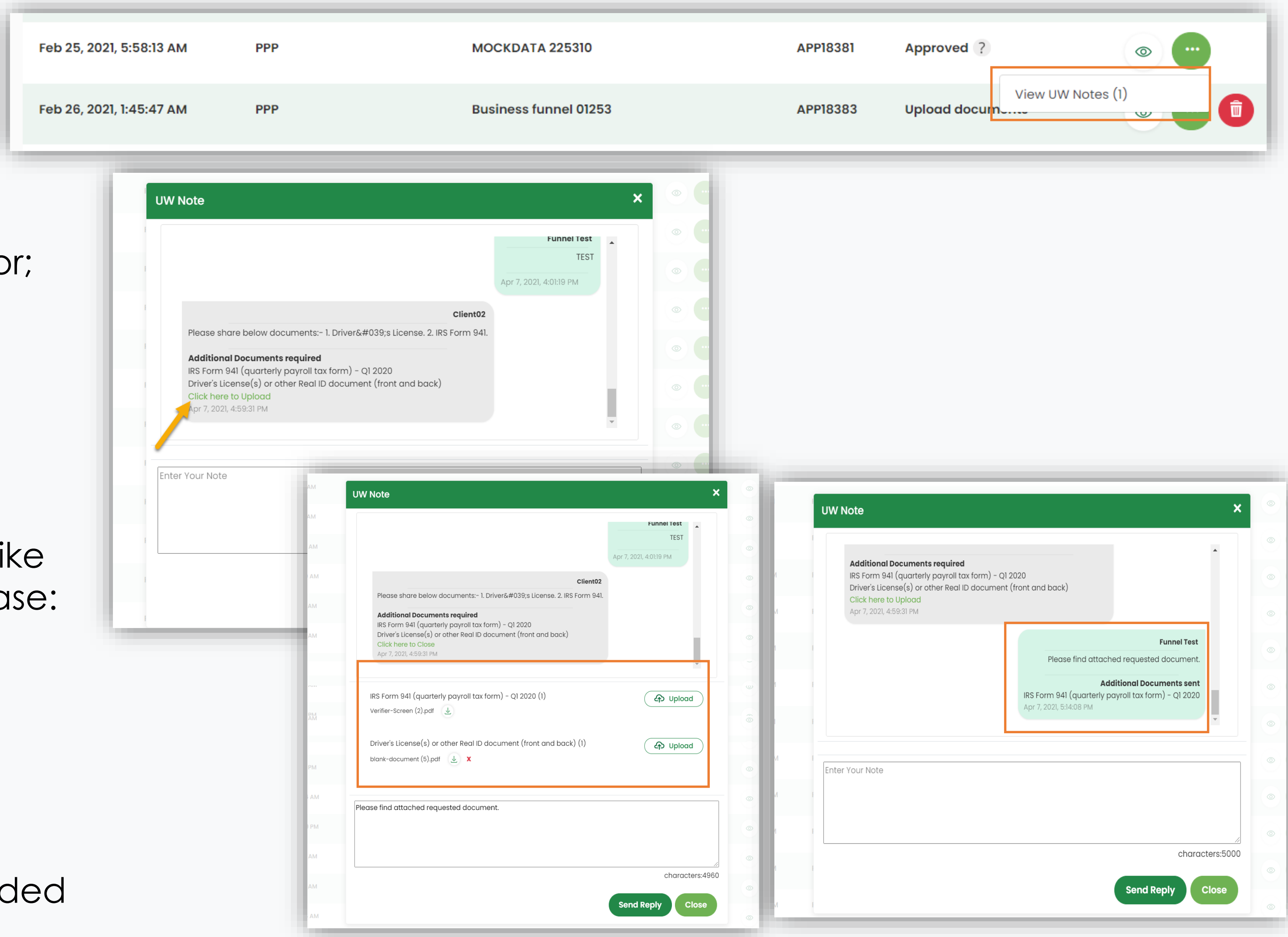
- click the "view application" option in the email, or;
- access the note via the portal

**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



# 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

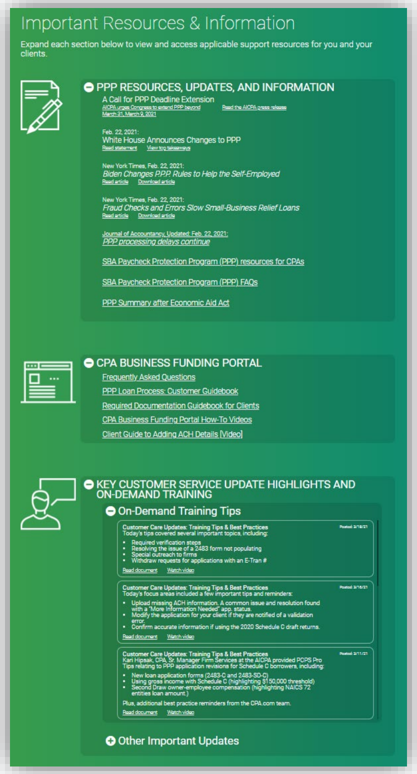
✓ **Semi-weekly webcast resources, such as:**

- 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

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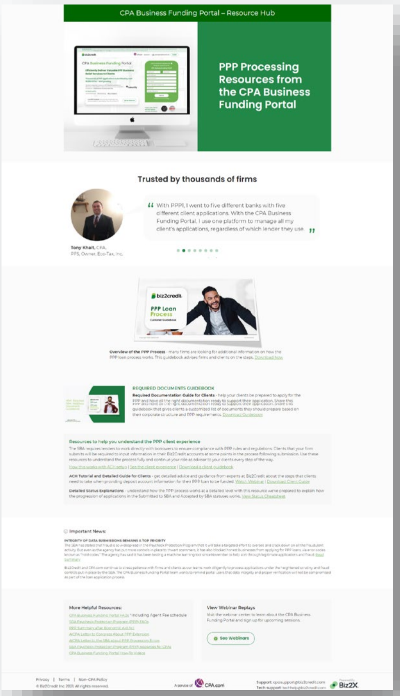


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# Our Customer Care Teams

## 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, esignature@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