biz2credit® CPA.com™

CPA Business Funding Portal

Live PPP Service Updates

May 11, 2021

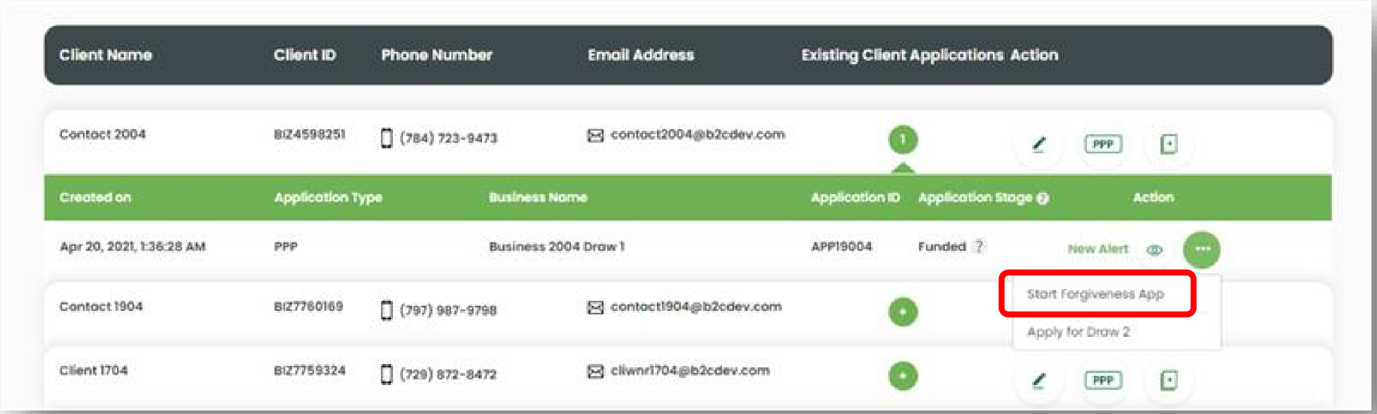
Customer Care Updates from the CPA Business Funding Portal Team

Training Tip: Forgiveness Application Updates

Training tip:

- To start preparing a forgiveness application, choose your client, click on the ellipsis from the dashboard and select 'Start Forgiveness App'

- Review important information on key forgiveness topics:
    - Forgiveness applications are open (8-week period must be met)
    - All forms and functionality are available
    - Biz2Credit funded applications must be started from the origination application



Go Deeper:

- [CPA Loan Portal How To Videos]
- FAQs in the CPA Loan Portal

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Training Tip: Docs Required for < $150K

Training tip

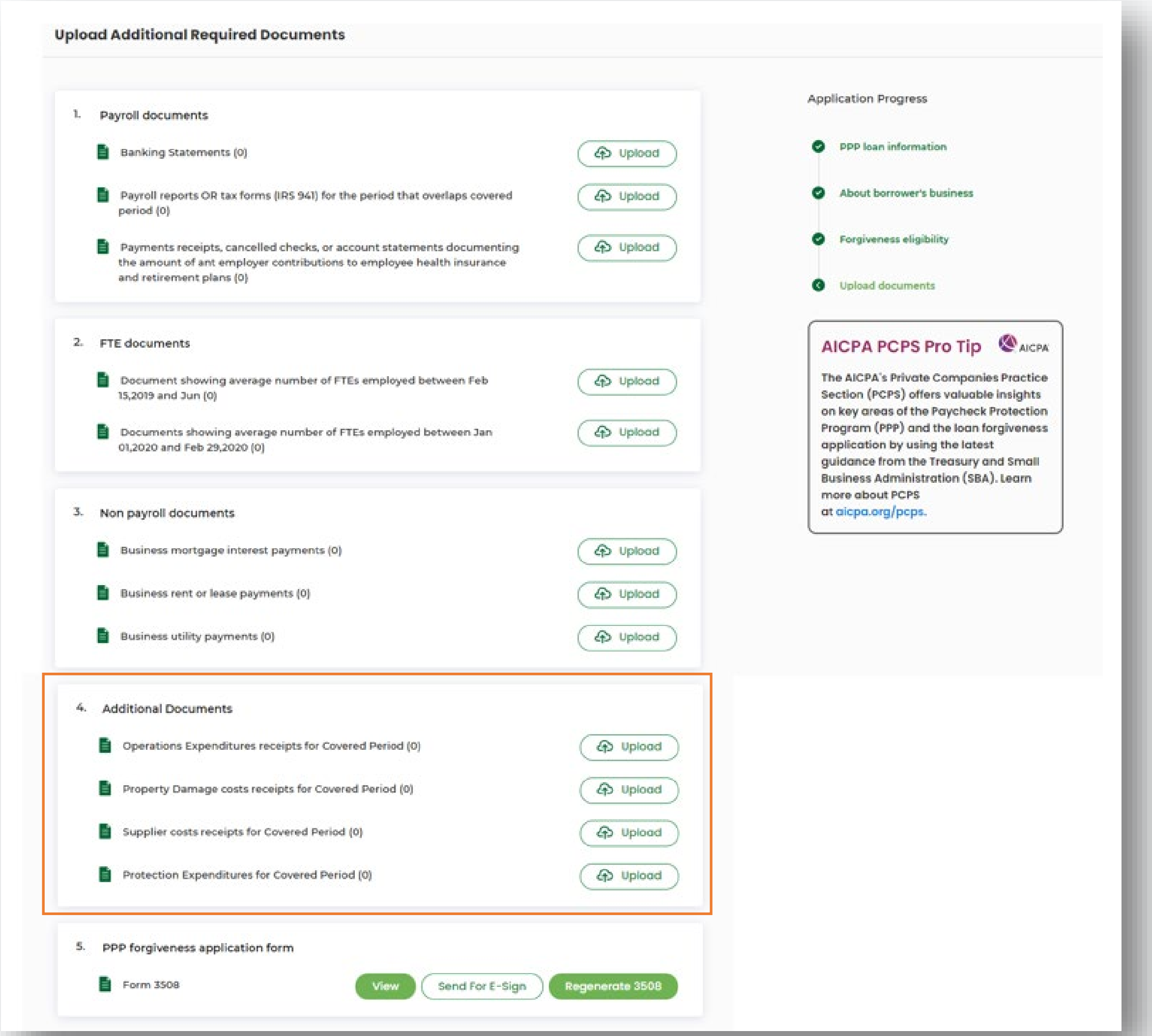
The following documentation is required for forgiveness applications less than $150k:

- 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 Application Due Dates

AICPA

Payments required

- 10 months after the latest day in the covered period
  - Economic Aid Act (12/27/2020) permits any covered period between 8 and 24 weeks
  - Payments are due 10 months after 24 weeks have passed since funding date.

Forgiveness application due

- Forgiveness can be applied for until the maturity date of the loan
  - Typically, 5 years
    - May be 2 years if loan received before the passing of the PPP Flexibility Act (6/5/2020)

Applicable Guidance

- SBA FAQs
- SBA FAQs on Loan Forgiveness

Customer Care Updates from the CPA Business Funding Portal Team

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 the May 20th event**.)
- 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 funding has not advanced in 48 hours, please contact cpasupport@biz2credit.com with:

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

Yodlee, Trouble Shooting

- Contact support for a new link
- If your clients' bank will not or cannot connect to Yodlee, please email cpasupport@biz2credit.com and ask for a DecisionLogic link

Uploading New Documents

- If you or your client has uploaded requested documents, please email cpasupport@biz2credit.com
- Let the support team know what documents you have uploaded

If you need to know what documents *need* to be uploaded, contact cpasupport@biz2credit.com

Resource Hubs

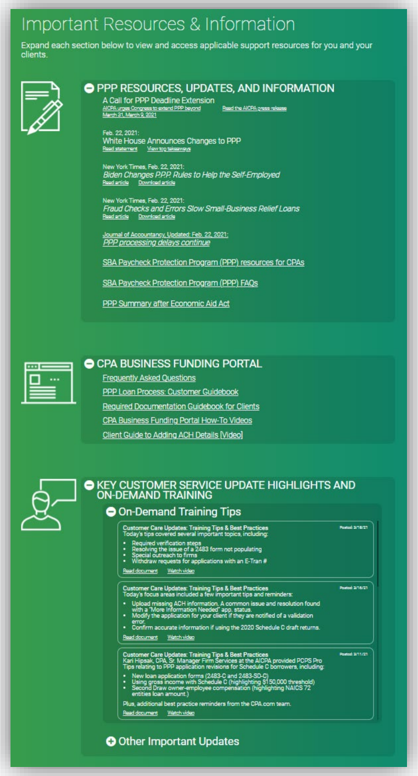
Visit either resource hub for information to help guide you through the second round of PPP

✓ **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

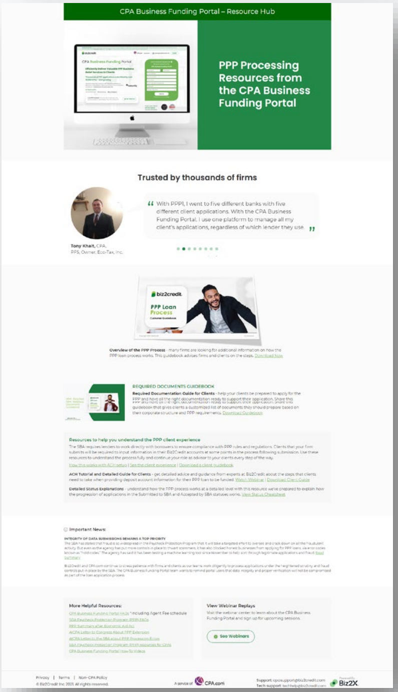
✓ **Semi-weekly webcast resources, such as:**
- Webinar replays
- Access to on-demand training clips and slides (*only* found at CPA.com/PPPResources)

✓ **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: 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, DecisionLogic requests
- Assistance when no underwriter notes (UW) available & "More Information Needed" status
- Withdraw requests
- General application status inquiries
- Resending contracts

Frequent FS Help items:

- Loan amount discrepancies
- Clarification around documents requested

Reach out to these specific contacts:

- Technical Issues (e.g. Login)
  - Email: techhelp@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 Thursday at 10am ET