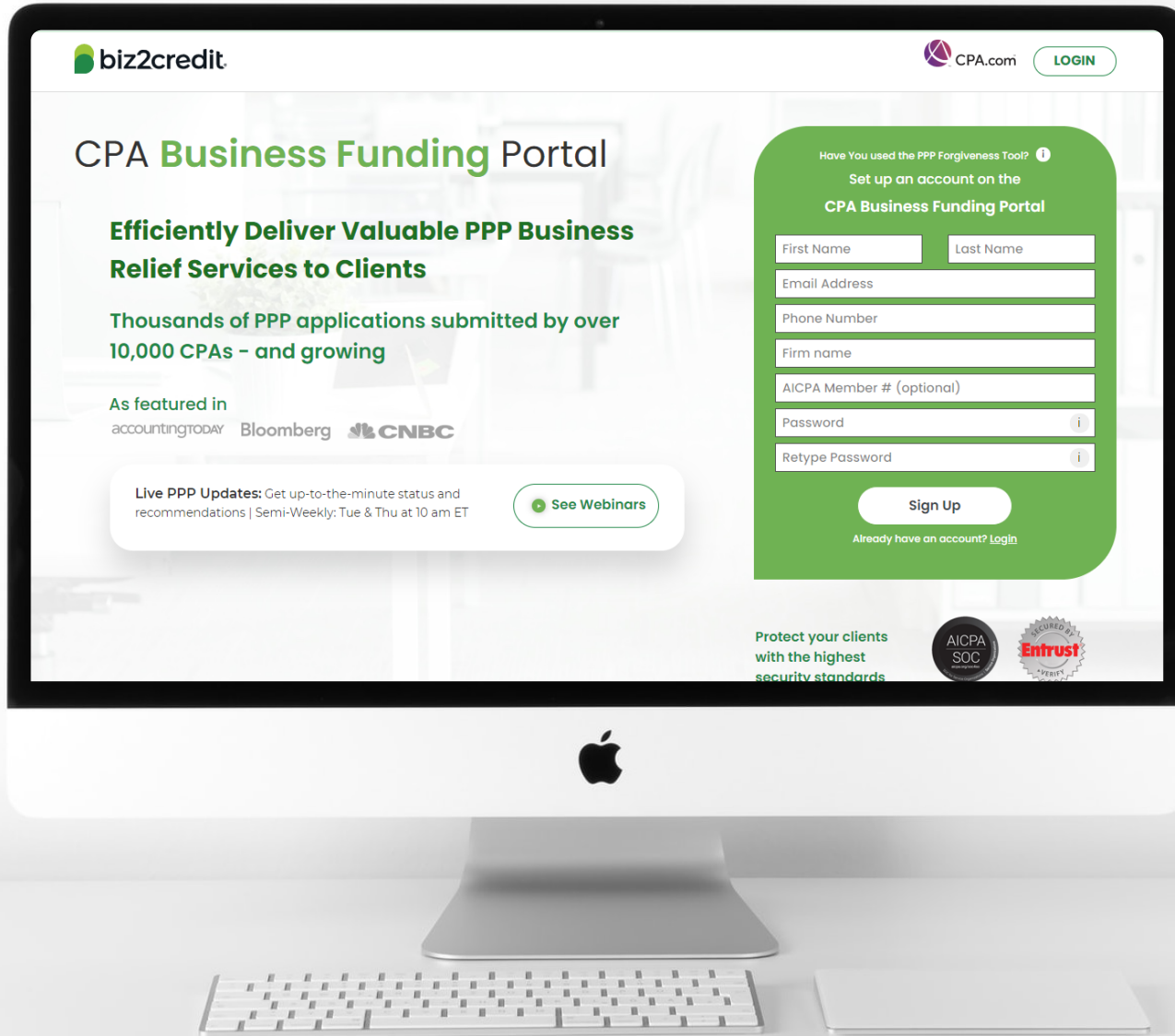




CPA **Business Funding** Portal

Live PPP Service Updates

May 11, 2021

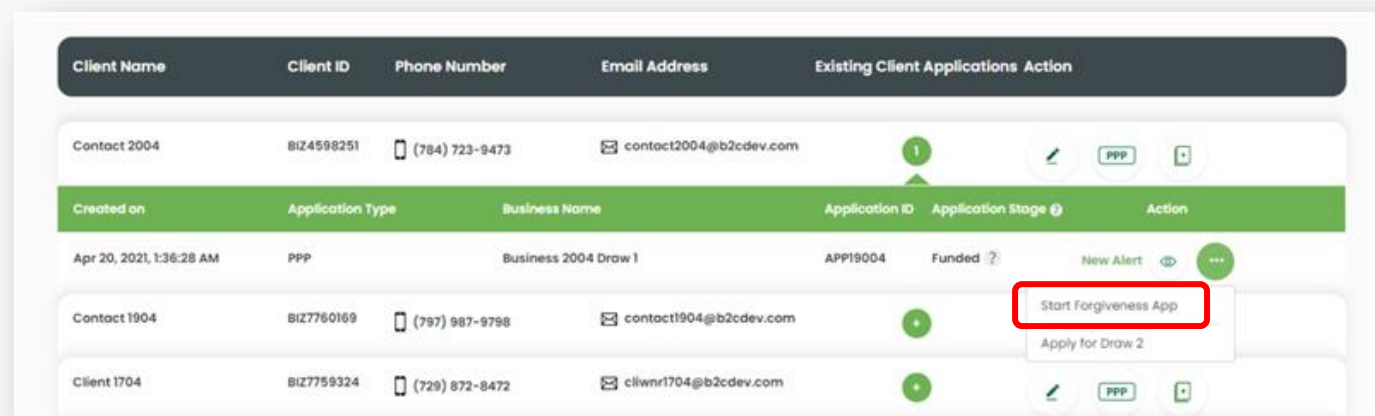


Customer Care Updates from the CPA Business Funding Portal Team

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



Client Name	Client ID	Phone Number	Email Address	Existing Client Applications	Action
Contact 2004	Biz4598251	(784) 723-9473	contact2004@b2cdev.com	<div><div></div><div></div><div></div></div>	<div><div></div><div></div><div></div></div>
Created on	Application Type	Business Name	Application ID	Application Stage	Action
Apr 20, 2021, 1:36:28 AM	PPP	Business 2004 Draw 1	APP19004	Funded ?	<div><div>New Alert</div><div></div><div></div></div>
Contact 1904	Biz7760169	(797) 987-9798	contact1904@b2cdev.com	<div><div></div><div></div><div></div></div>	<div><div></div><div></div><div></div></div>
Client 1704	Biz7759324	(729) 872-8472	cliwnr1704@b2cdev.com	<div><div></div><div></div><div></div></div>	<div><div></div><div></div><div></div></div>

Go Deeper:

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

The screenshot displays the 'Upload Additional Required Documents' section of the AICPA PCPS Pro Tip application. It is organized into five numbered steps, each with a list of documents and an 'Upload' button. Step 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). Step 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). Step 3, 'Non payroll documents', includes Business mortgage interest payments (0), Business rent or lease payments (0), and Business utility payments (0). Step 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). Step 5, 'PPP forgiveness application form', includes Form 3508, with buttons for 'View', 'Send For E-Sign', and 'Regenerate 3508'. On the right, the 'Application Progress' section shows a vertical list of steps: PPP loan information, About borrower's business, Forgiveness eligibility, and Upload documents (which is currently active). Below this is the 'AICPA PCPS Pro Tip' section, which provides information about the AICPA's Private Companies Practice Section (PCPS) and its resources for PPP and loan forgiveness applications.

Upload Additional Required Documents

1. Payroll documents

- Banking Statements (0) Upload
- Payroll reports OR tax forms (IRS 941) for the period that overlaps covered period (0) Upload
- Payments receipts, cancelled checks, or account statements documenting the amount of ant employer contributions to employee health insurance and retirement plans (0) Upload

2. FTE documents

- Document showing average number of FTEs employed between Feb 15, 2019 and Jun (0) Upload
- Documents showing average number of FTEs employed between Jan 01, 2020 and Feb 29, 2020 (0) Upload

3. Non payroll documents

- Business mortgage interest payments (0) Upload
- Business rent or lease payments (0) Upload
- Business utility payments (0) Upload

4. Additional Documents

- Operations Expenditures receipts for Covered Period (0) Upload
- Property Damage costs receipts for Covered Period (0) Upload
- Supplier costs receipts for Covered Period (0) Upload
- Protection Expenditures for Covered Period (0) Upload

5. PPP forgiveness application form

- Form 3508 View Send For E-Sign Regenerate 3508

Application Progress

- PPP loan information
- About borrower's business
- Forgiveness eligibility
- Upload documents

AICPA PCPS Pro Tip AICPA

The AICPA's Private Companies Practice Section (PCPS) offers 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 Application Due Dates



Applicable Guidance

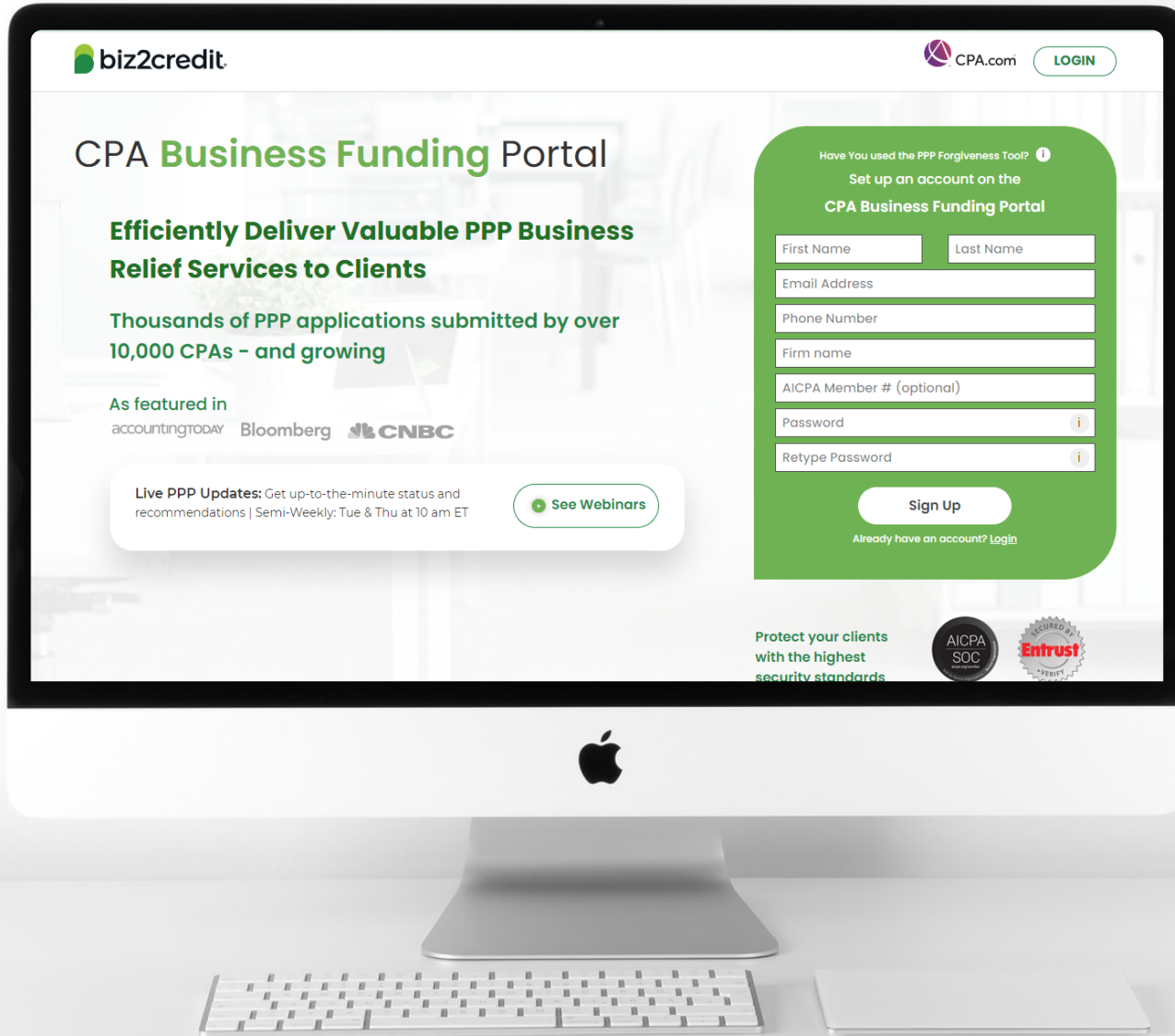
- [SBA FAQs](#)
- [SBA FAQs on Loan Forgiveness](#)

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)



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](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 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)

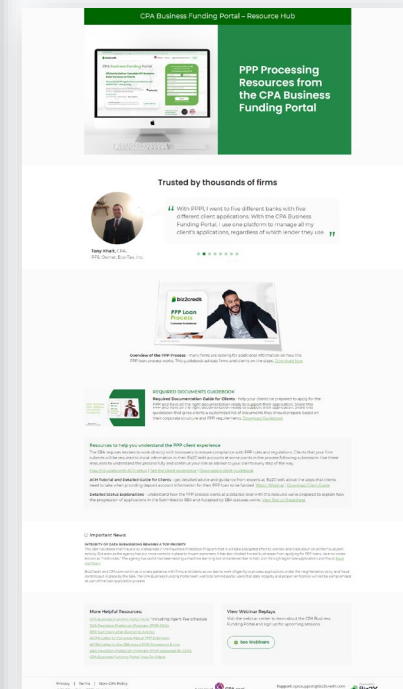
✓ **PPP Information, such as:**

- Recent news articles
- AICPA resources
 - SBA Paycheck Protection Program (PPP) FAQs
 - *PPP Summary after Economic Aid Act*

CPA.com/PPPResources



CPALoanPortal.com/Resource-Hub



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