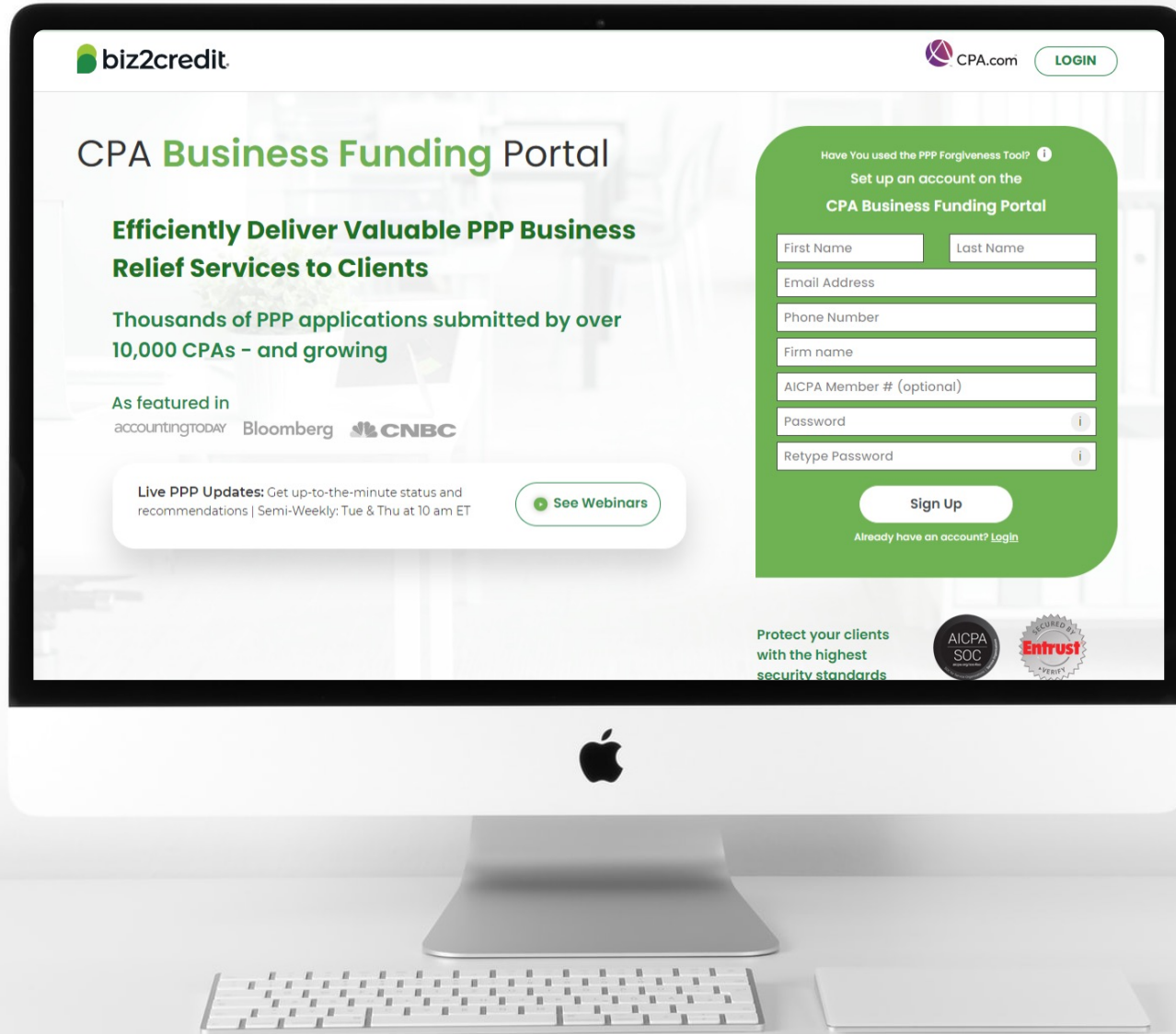




# CPA **Business Funding** Portal

Live PPP Service Updates

May 13, 2021

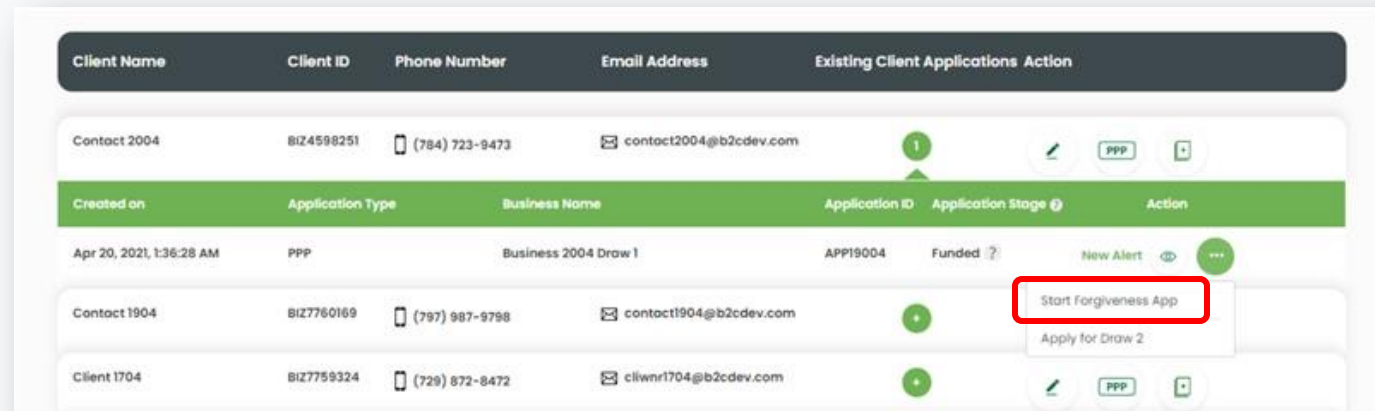


# Customer Care Updates from the CPA Business Funding Portal Team

# Training Tip: Forgiveness Application Updates

## Training tip:

- Biz2Credit funded applications must be started from the original loan application
- To start a 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 (covered period must be met prior to submitting forgiveness application)
  - All forms and functionality are now available



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></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></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></div><div></div></div>

## Go Deeper:

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

# Training Tip: Application Creation

## Training tip

Important information for preparing forgiveness applications on loans **not** funded by Biz2Credit

- *Loan Originator*
  - Check with the originator of the loan regarding their requirements for forgiveness application completion & submission
  - The loan originator can work with Biz2Credit, and the application cover letter will be used to facilitate this process
- *CPA Business Funding Portal Steps*
  - Create a new client in the portal
  - Complete PPP forgiveness application
  - Provide the application package to original loan provider

**New Client** ✕

Business Name  
**Quantum Corp.**

Contact Name  
**Julie**

Phone Number  
**(123) 456-7899**

Email Address  
**quantum.demo.environment@hq.cpa.com**

Start with

☒ PPP forgiveness application ☐ PPP loan application

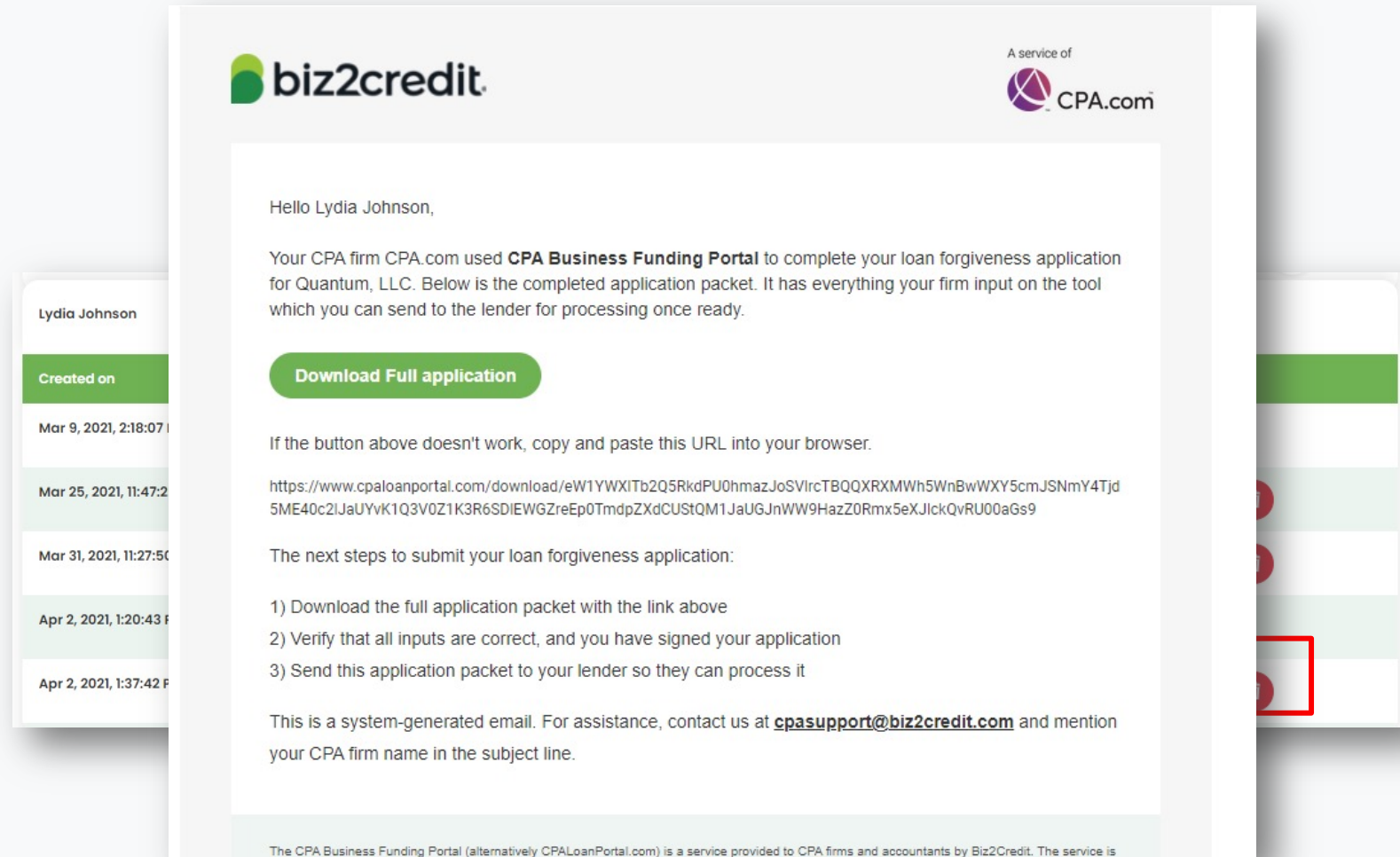
**Submit** →

# Training Tip: Forgiveness App Package

## Training tip

If a borrower applied and was funded for draw 1 with another lender but is applying for forgiveness through the CPA Business Funding Portal, then the application package must be provided to the original lender

- Once e-signature process is complete, the forgiveness application package can be downloaded and includes:
  - Loan Forgiveness Cover Sheet
  - PPP Loan Forgiveness Application
- The borrower will also receive an email notification regarding the forgiveness application



# 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 20<sup>th</sup> event.](#))
- Continue joining these semi-weekly webcasts

## Use the resource hubs

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

# 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






Refer to the [Shorthand Cheat Sheet](#)

### 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 [cpasupport@biz2credit.com](mailto:cpasupport@biz2credit.com) 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  [Upload](#)

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

Please find attached requested document.

characters:4960

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

**UW Note**

Funnel Test

Please find attached requested document.

**Additional Documents sent**  
IRS Form 941 (quarterly payroll tax form) - Q1 2020  
Apr 7, 2021, 5:14:08 PM

Enter Your Note

characters:5000

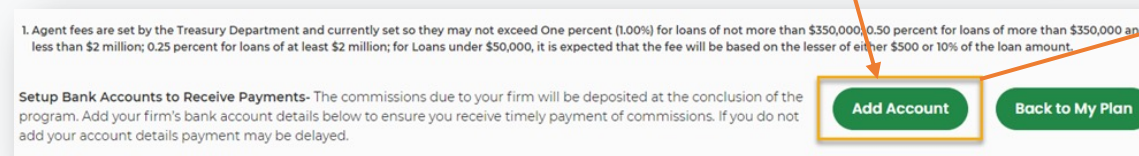
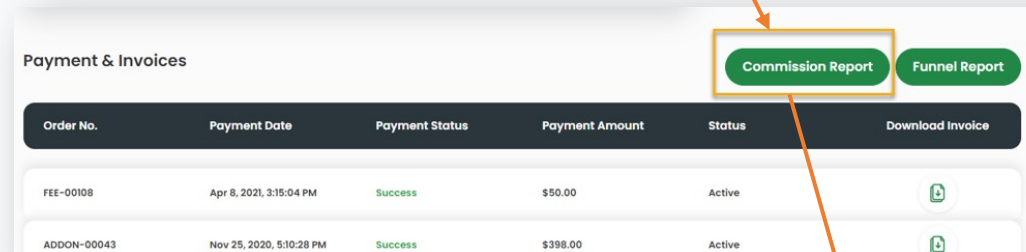
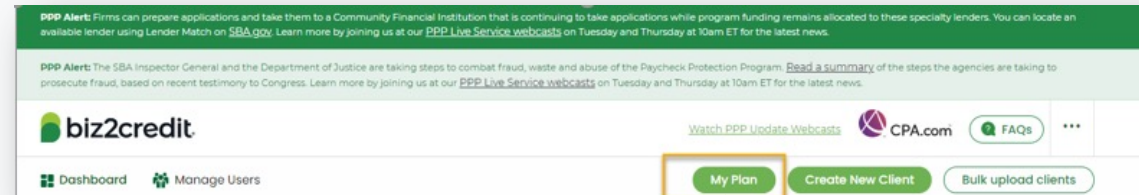
[Send Reply](#) [Close](#)



# Customer Care Reminders

## Adding Banking Details for Agent Fee Payment

1. Login to the Super Admin. Account
2. Click on the 'My Plan' button in the top navigation area
3. Scroll down and click on the 'Commission Report' button under the 'Payment & Invoices' section
4. Scroll to the 'Setup Bank Account' section and click the 'Add Account' button
5. Add requested banking details and click 'Save'



The screenshot shows the 'Add Bank Account' form. It includes fields for Bank Name, Routing Number, Account Number, Confirm Account Number, Account Type (Please Select), and Tax ID. There are 'Cancel' and 'Save' buttons at the bottom.



# Customer Care Reminders

## Contact Support for DocuSign Help

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

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

## Yodlee, Trouble Shooting

- Contact support for for a new link
- If your clients' bank will not or cannot connect to Yodlee, please email [cpasupport@biz2credit.com](mailto: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](mailto: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](mailto: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](https://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](https://CPA.com/PPPResources))

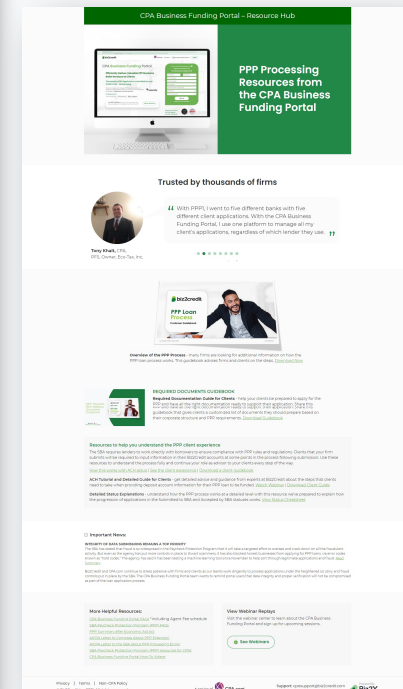
✓ **PPP Information, such as:**

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

[CPA.com/PPPResources](https://CPA.com/PPPResources)



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



# Our Customer Care Teams

## Customer Service Managers

Email Support Available: 8am – 8pm ET  
[cpasupport@biz2credit.com](mailto: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 & DecisionLogic link re-send requests
- Assistance when no underwriter notes (UW) available & "More Information Needed" status
- Withdraw requests
- General application status inquiries
- DocuSign link re-send requests

### 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](mailto: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](mailto:cpasupport@biz2credit.com)

Technical Issues (e.g. Login)

[techhelp@biz2credit.com](mailto:techhelp@biz2credit.com)

## Find Resources

Check for frequent **emails** from  
[cpa@biz2credit.com](mailto: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