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CPA Business Funding Portal

Live PPP Service Updates

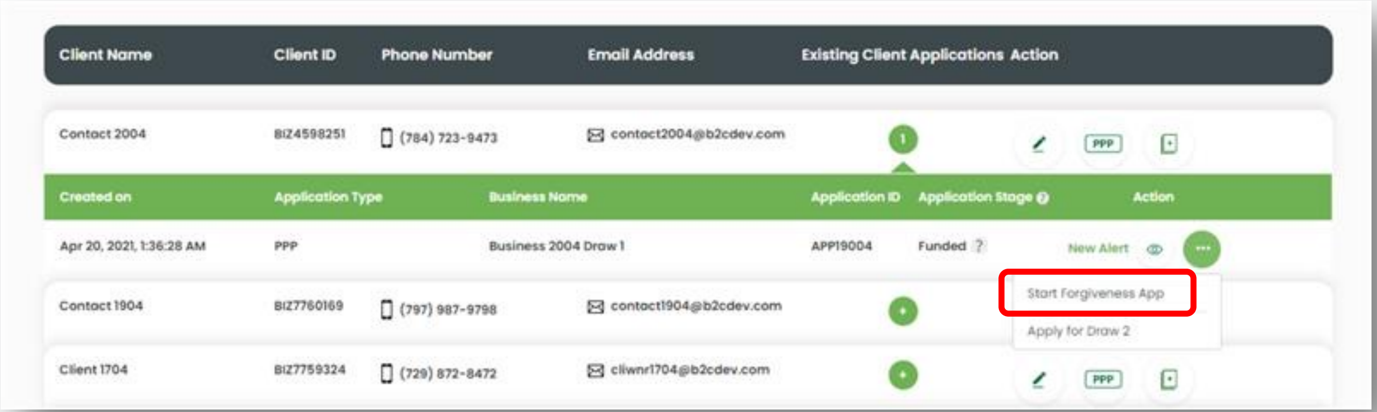
May 13, 2021

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



Go Deeper:

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

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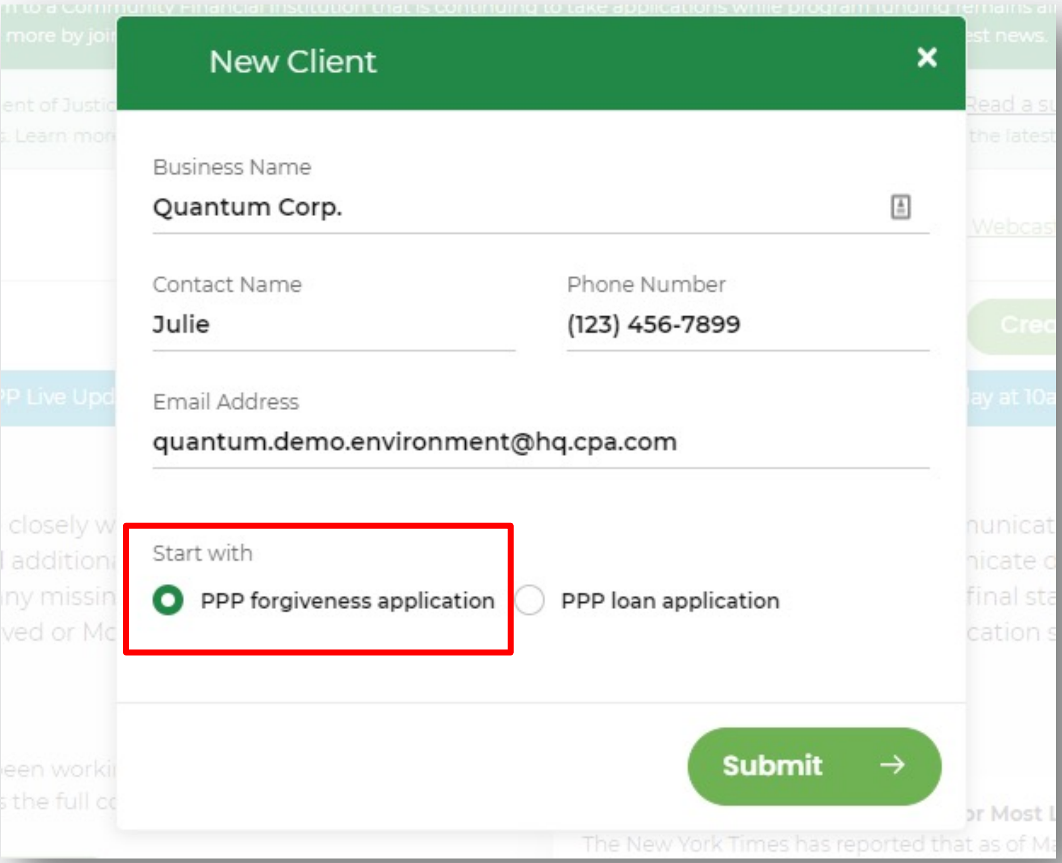
Training Tip: Application Creation

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

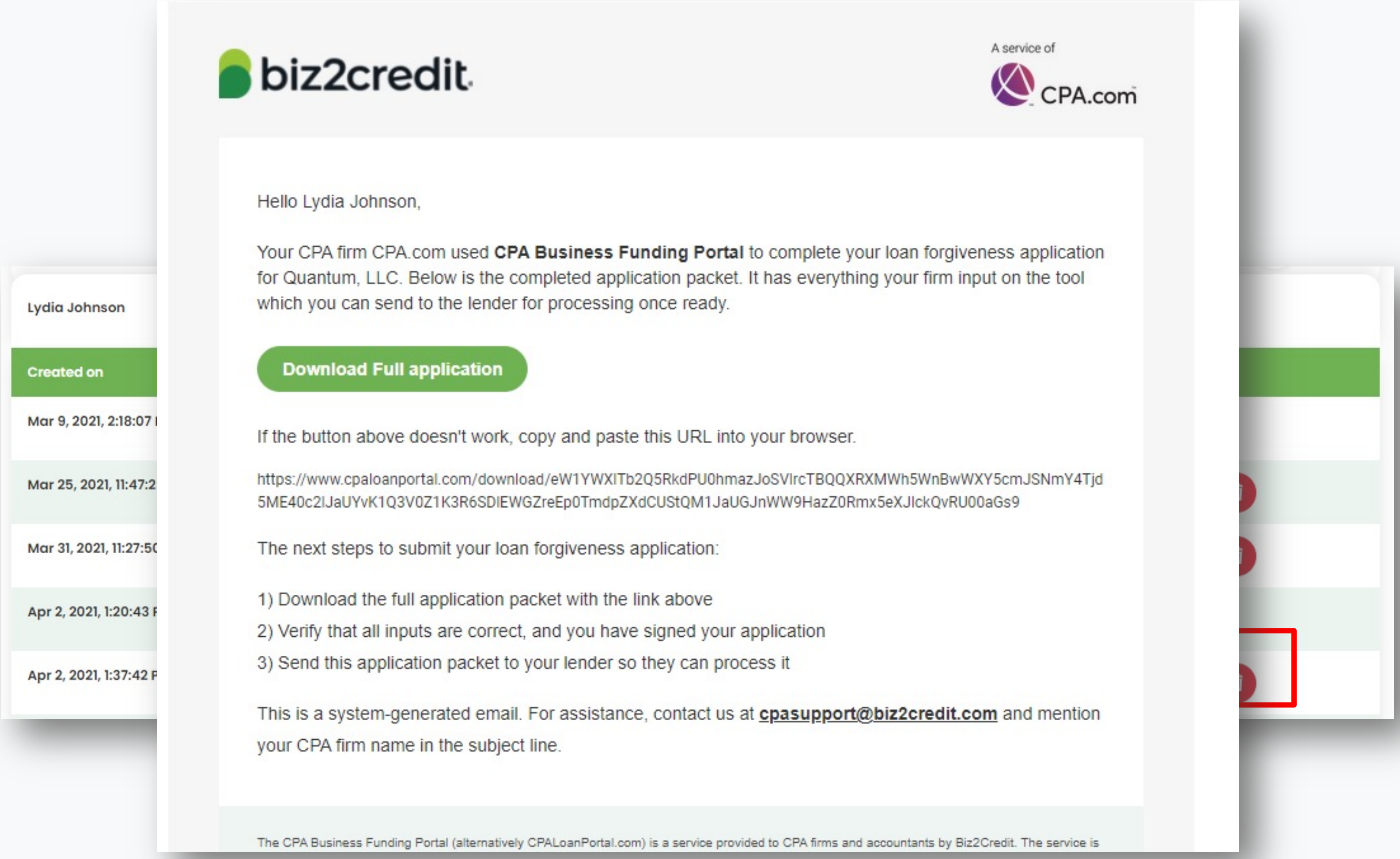


Training Tip: Forgiveness App Package

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



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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

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

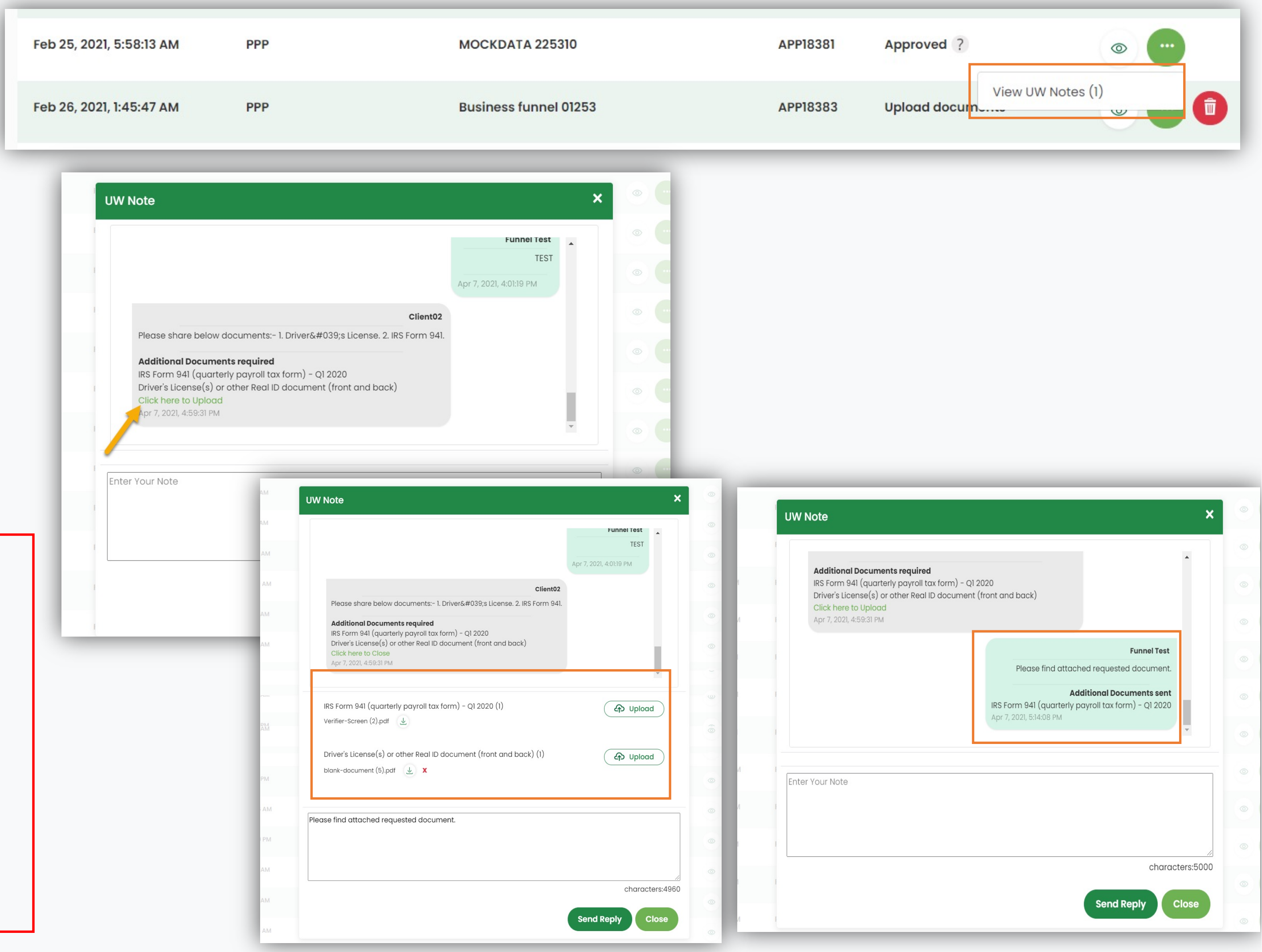
Refer to the [Shorthand Cheat Sheet]

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:

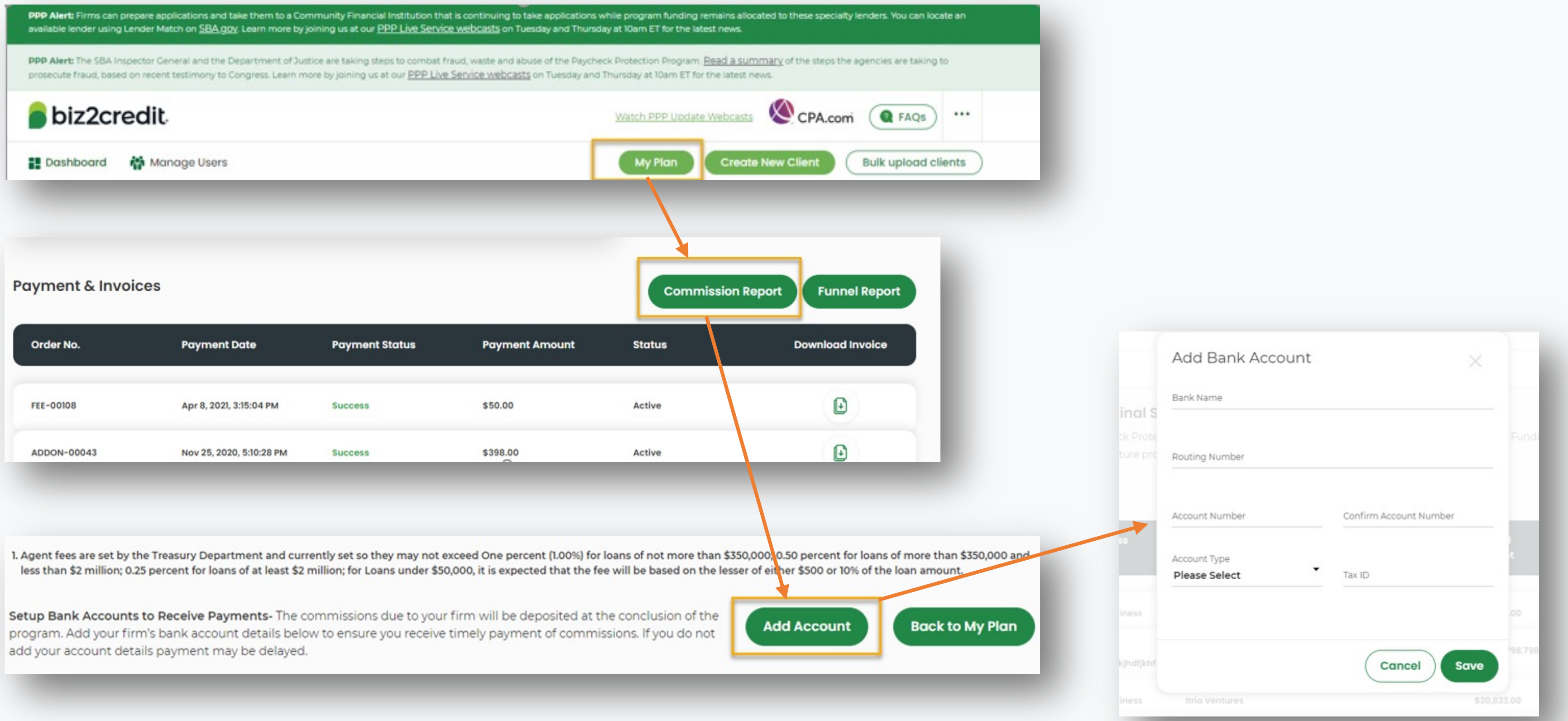
- ✓ Check back the following day
- ✓ Email cpasupport@biz2credit.com with:
  - Case ID
  - Legal Business Name
  - Current Status
    - Including if new information was uploaded



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'



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

- Contact support for 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

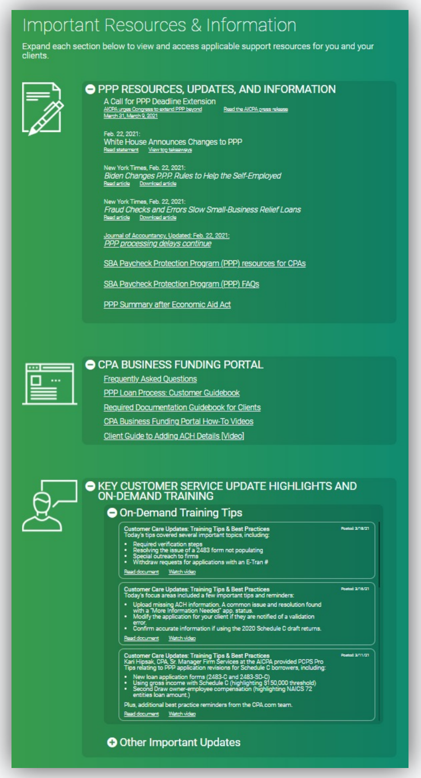
Visit either resource hub for information to help guide you through the second round of PPP

✓ **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

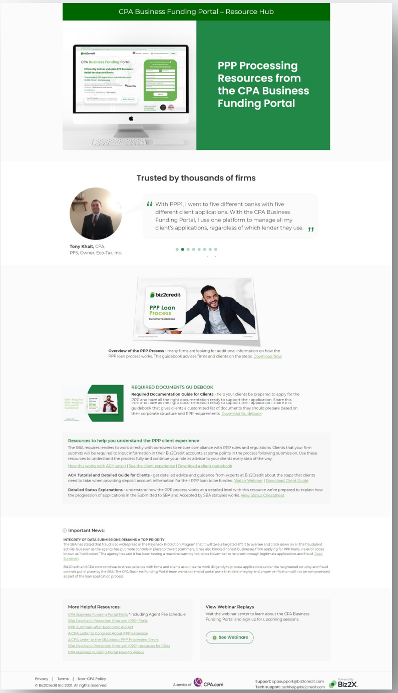
✓ **Semi-weekly webcast resources, such as:**
- Webinar replays
- Access to on-demand training clips and slides (*only* found at CPA.com/PPPResources)

✓ **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 & 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

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