CPA Business Funding Portal

Live PPP Service Updates

May 27, 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

PCPS Pro Tip: Forgiveness Calculators

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.

Go Deeper:

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

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Forgiveness: Documentation

Training tip

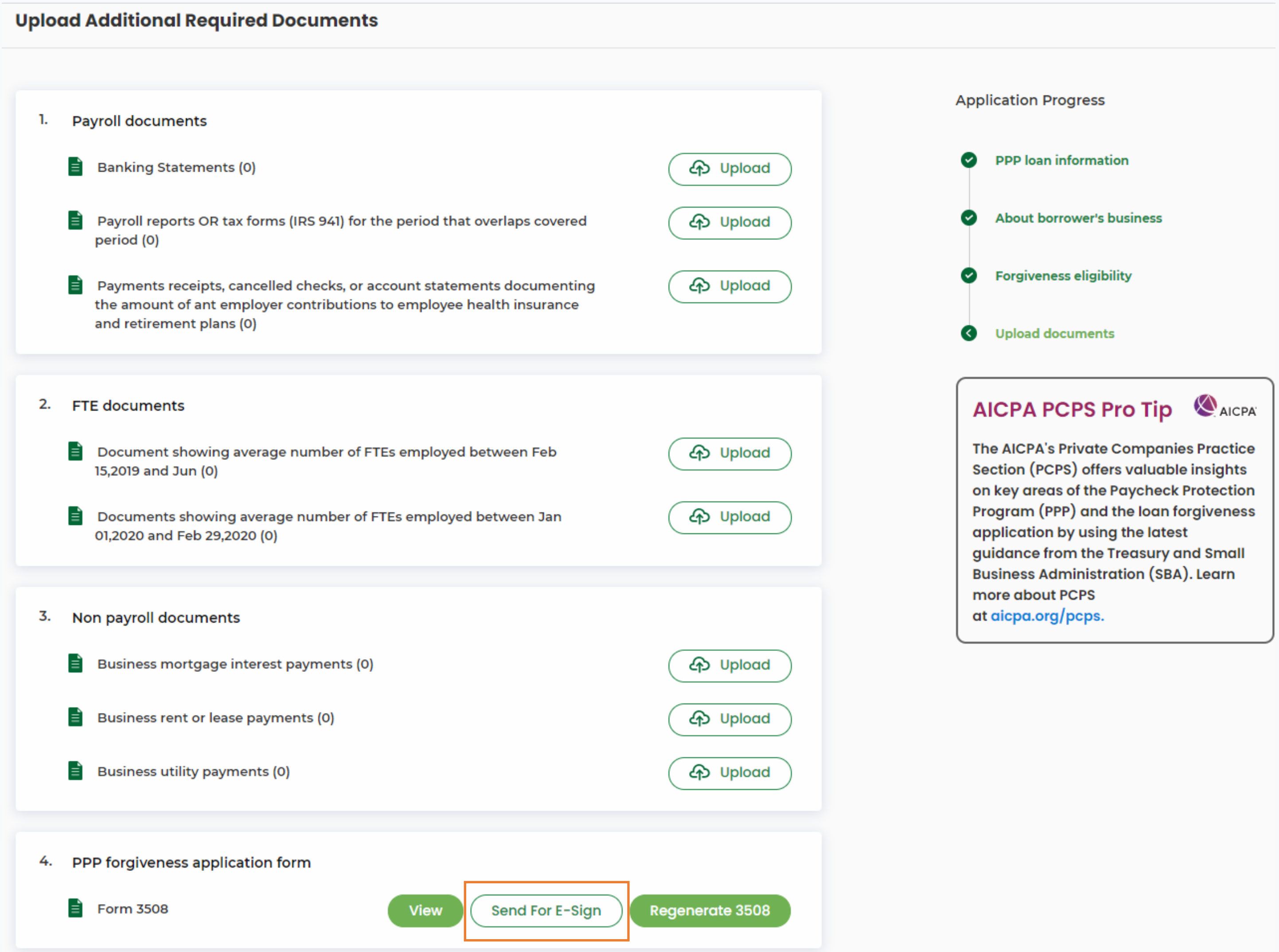
3508 auto populates in the platform

Prepare:

- Upload all documentation requested
- Ensure e-signature journey is complete
- 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

Go deeper

Series of Forgiveness Resources available at aicpa.org/sba

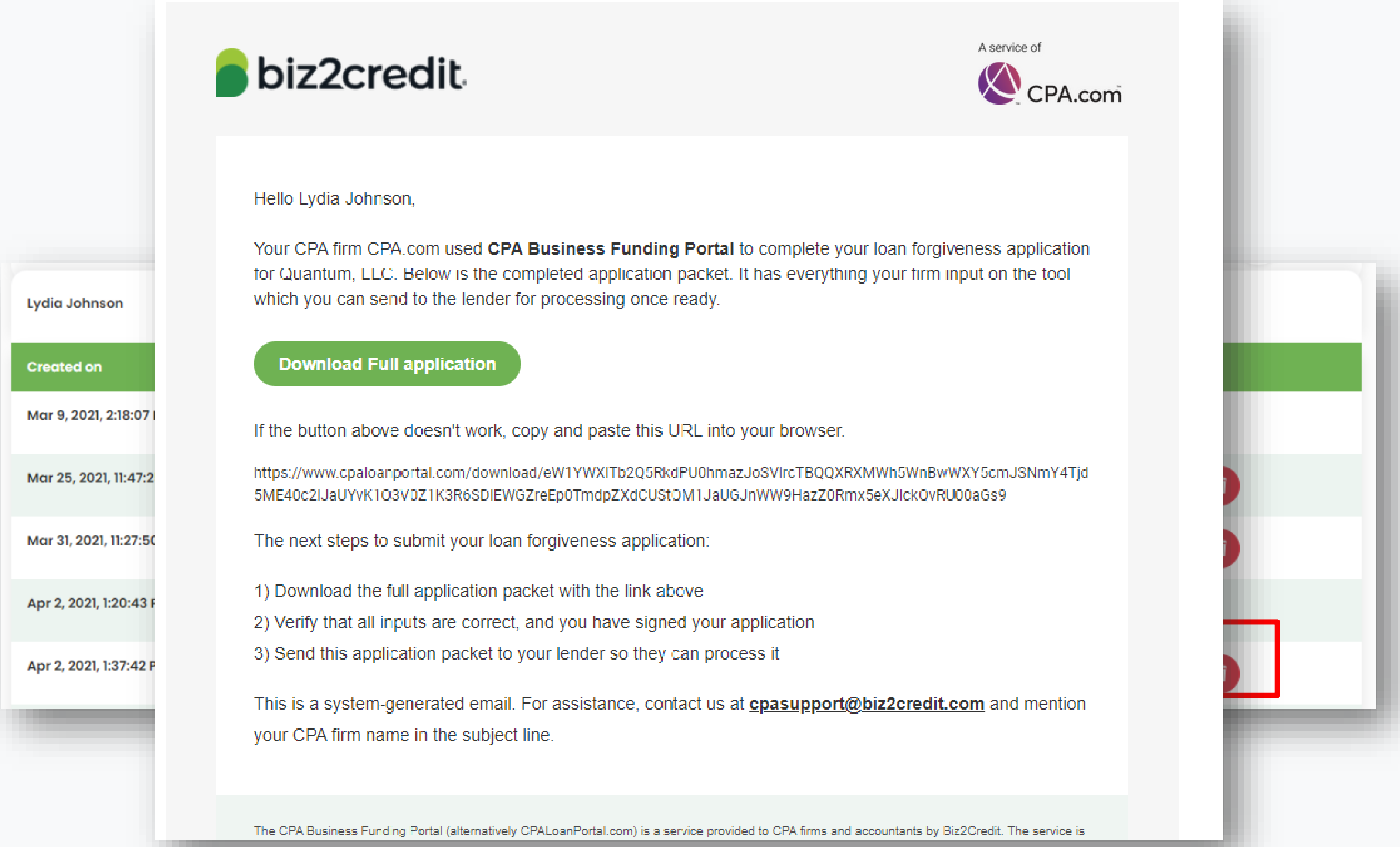


Training Tip: Forgiveness App Package

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 June 3rd event.)**
- Continue joining these semi-weekly webcasts

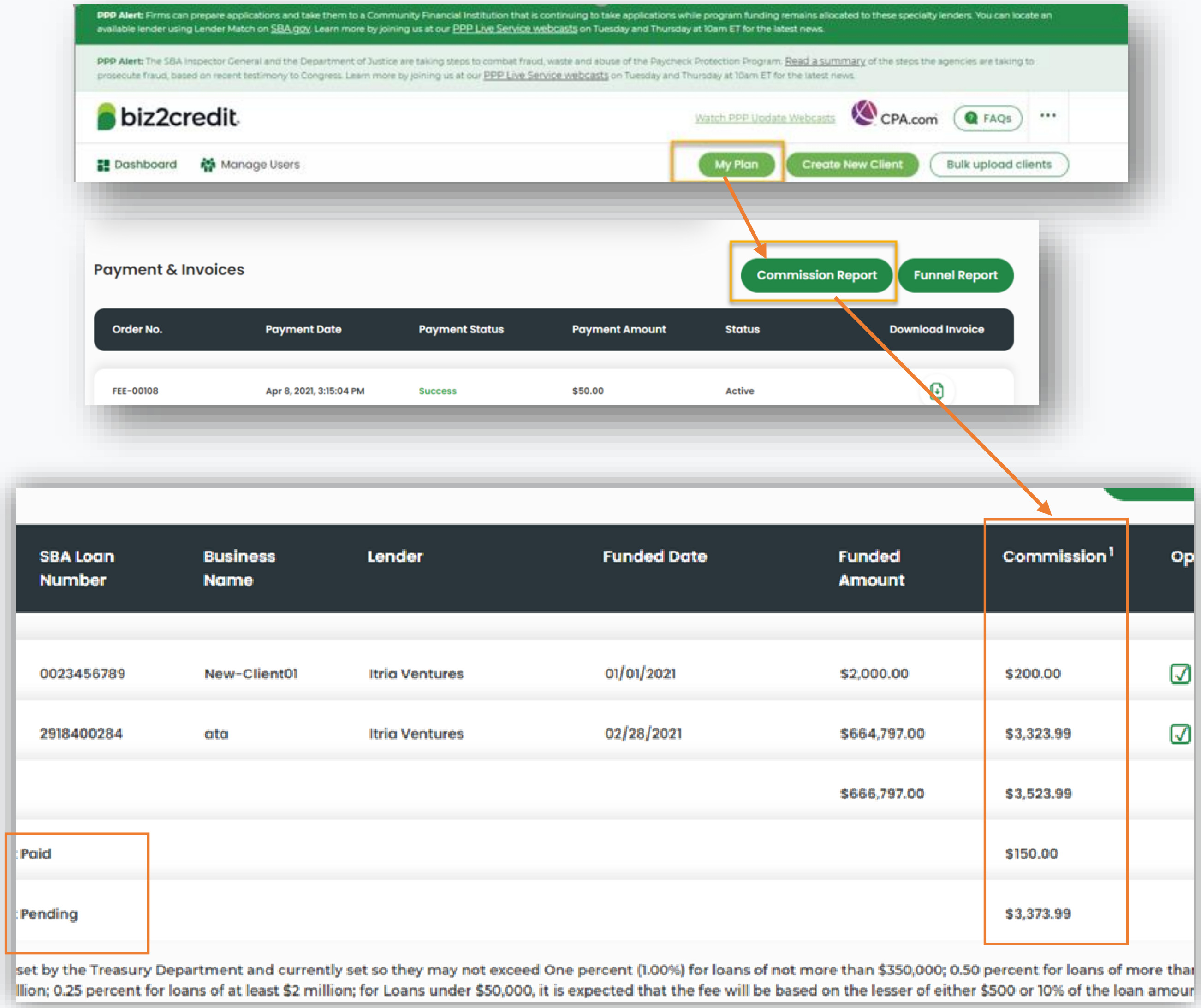
Use the resource hubs

- CPA.com/PPPResources
- CPALoanPortal.com/Resource-Hub

Customer Care Reminders

Viewing Agent Fee Payments

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. Find column labeled, ‘Commission’ to see the total amount paid and total amount pending.



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

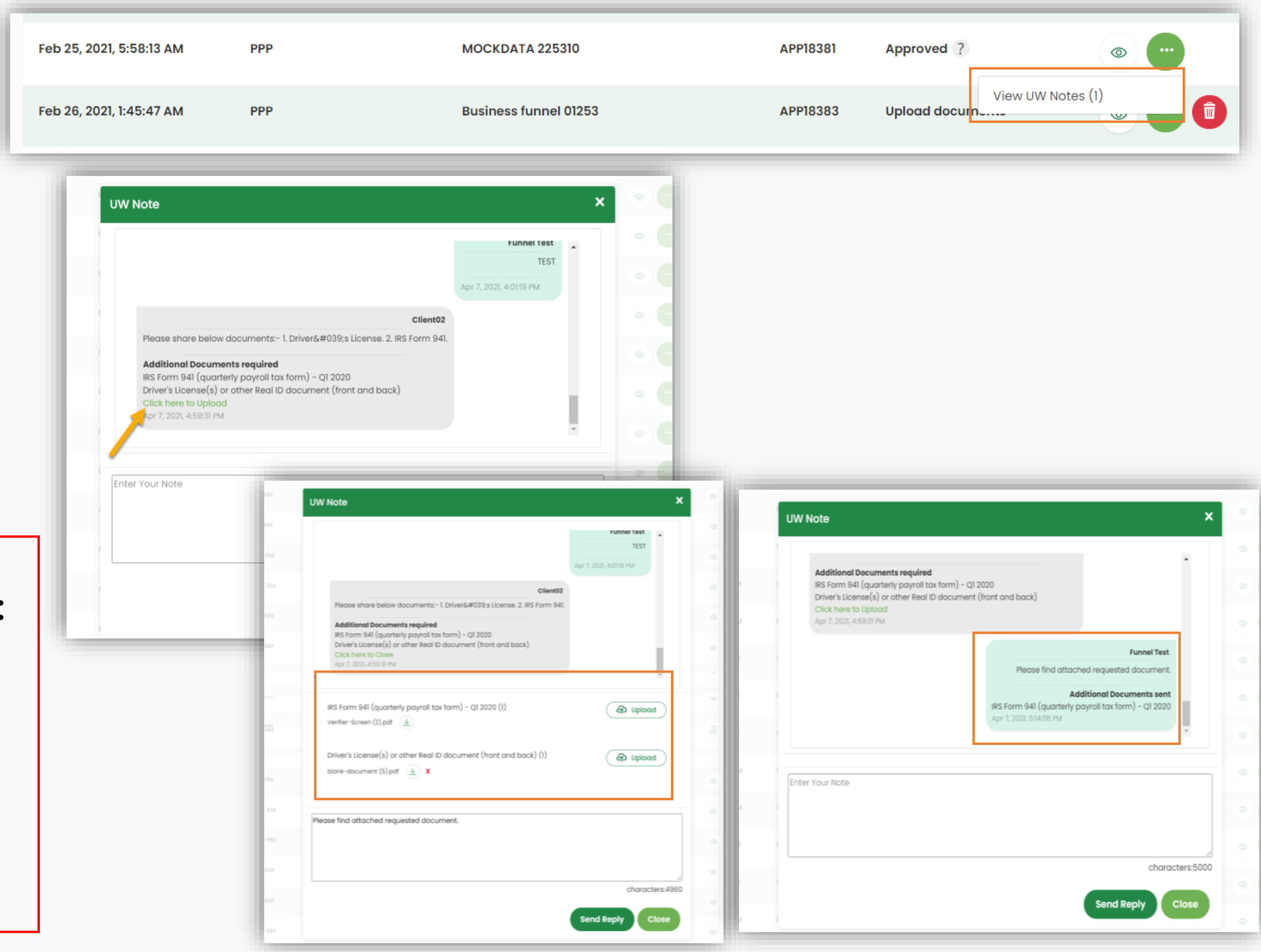
Refer to the Shorthand Cheat Sheet

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

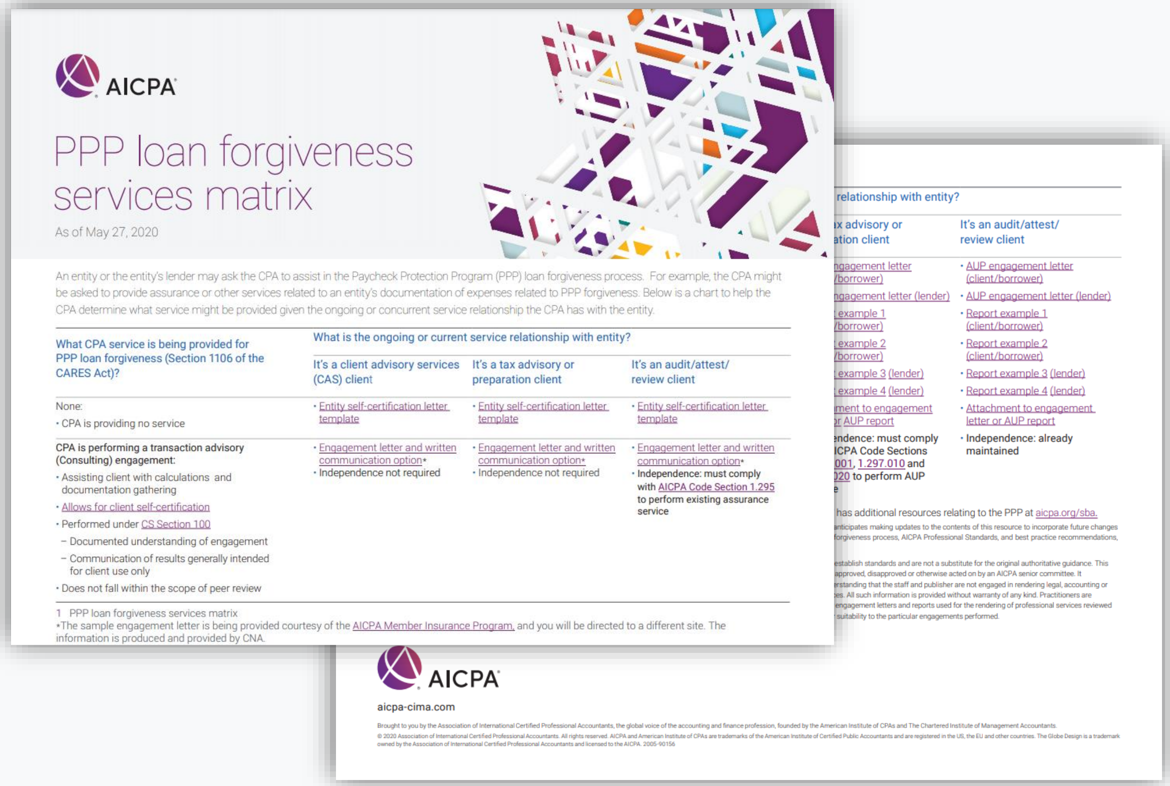


Customer Care Reminders

CPA Resources to Support Forgiveness Engagement with Clients

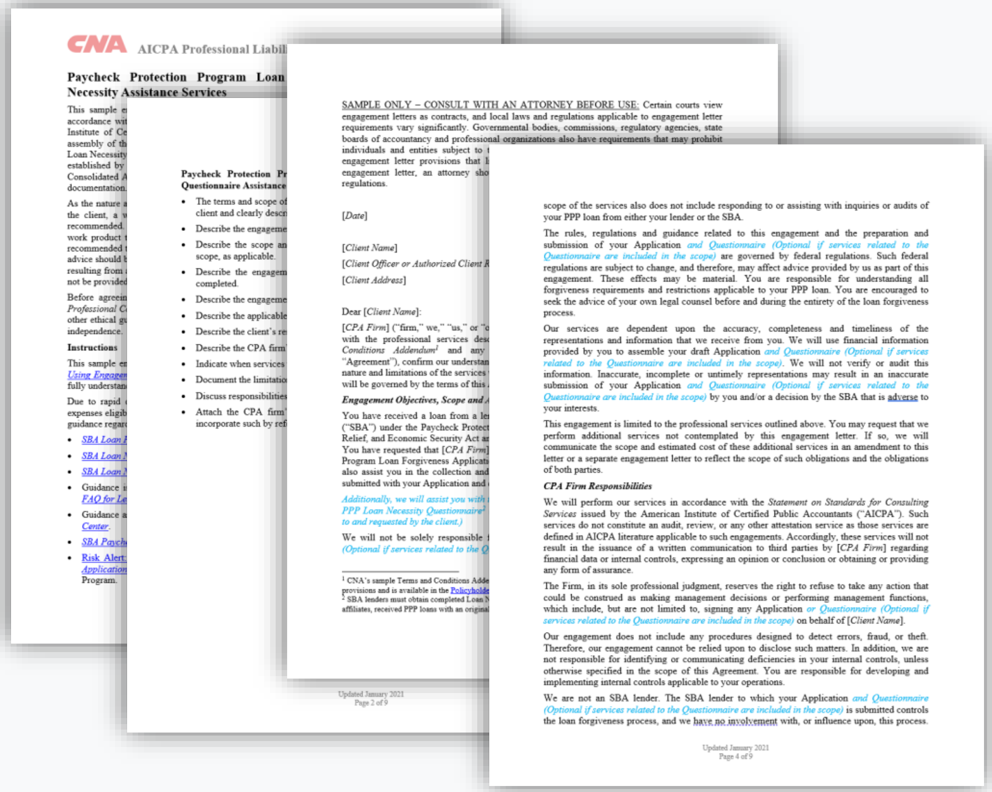
AICPA Services Matrix

[Download here]



Engagement Letter

[Download here]



Resource Hubs

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

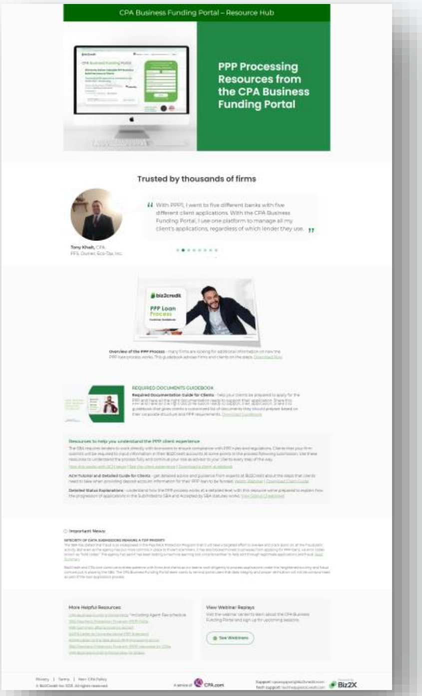
✓ **Helpful Portal resources for you and your clients, such as:**
- How-To Videos
- Access to FAQs (also found at: CPALoanPortal.com/#PPPFAQ)
- Required Documentation Guide
- ACH Tutorial and Detailed Guide

✓ **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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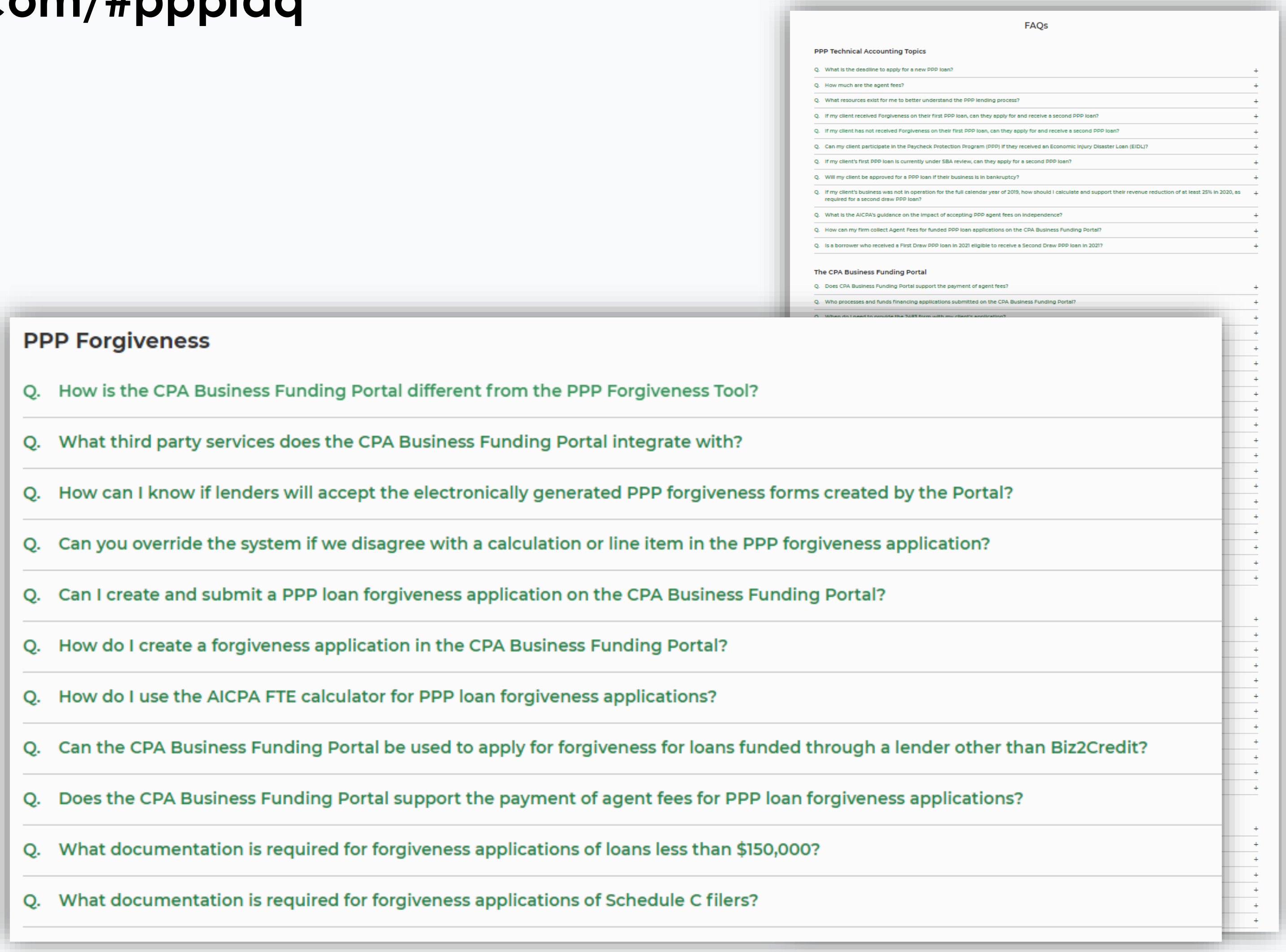
FAQs

Reference the FAQs at CPALoanPortal.com/#pppfaq

✓ **FAQs sorted by topic area**

- PPP Technical Accounting Topics
- The CPA Business Funding Portal
- PPP Applications
- PPP Forgiveness

✓ **FAQs specifically for forgiveness**



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