CPA Business Funding Portal

Live PPP Service Updates

June 3, 2021

Customer Care Updates from the CPA Business Funding Portal Team

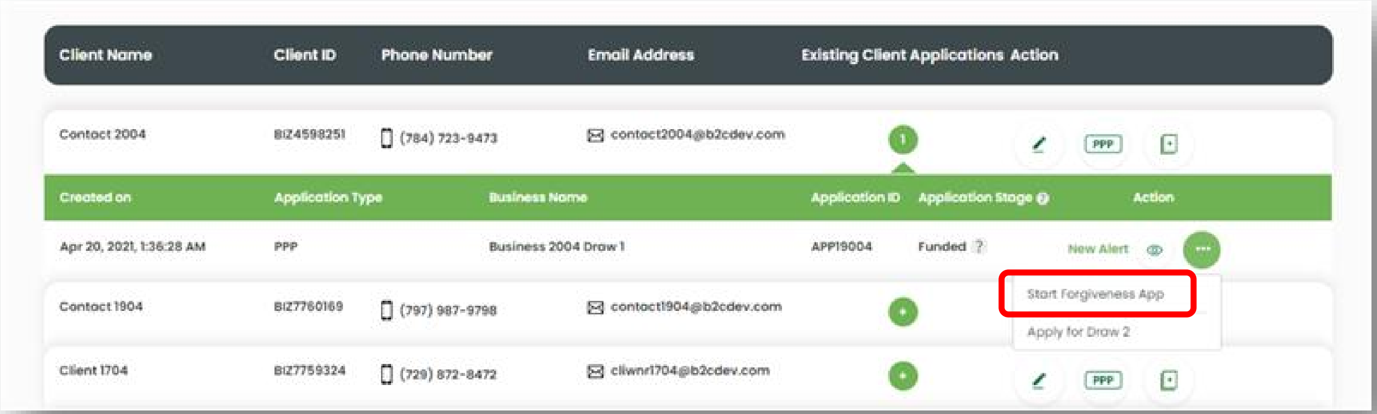
Forgiveness Application Updates

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 > select 'Start Forgiveness App'

- Review important information on key forgiveness topics:
  - Forgiveness applications are open for all loans beyond 8 weeks of funding
  - All forms and functionality are now available



Go Deeper:

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

biz2credit CPA.com

CPA **Business Funding** Portal

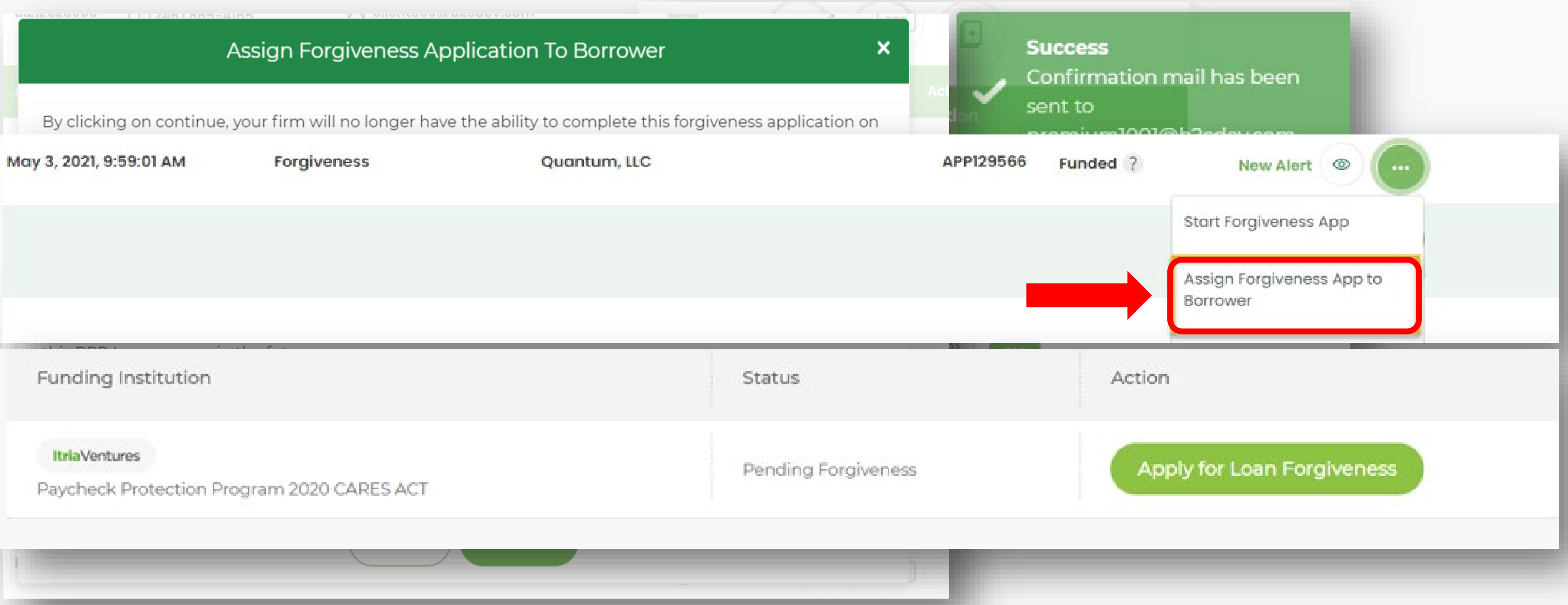
Forgiveness Application for Borrowers

Training Tip:

- Biz2Credit funded forgiveness applications can now be assigned to the borrower

- To start this process
    - Choose your client > click on the ellipsis from the dashboard > select 'Assign Forgiveness App to Borrower'

- Important Reminder:
    - This action can only be initiated by the firm
    - Once this action is taken, the application ***cannot*** be taken back from the borrower
    - The borrower will receive an email with a link to login and begin their forgiveness application.



Go Deeper:

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

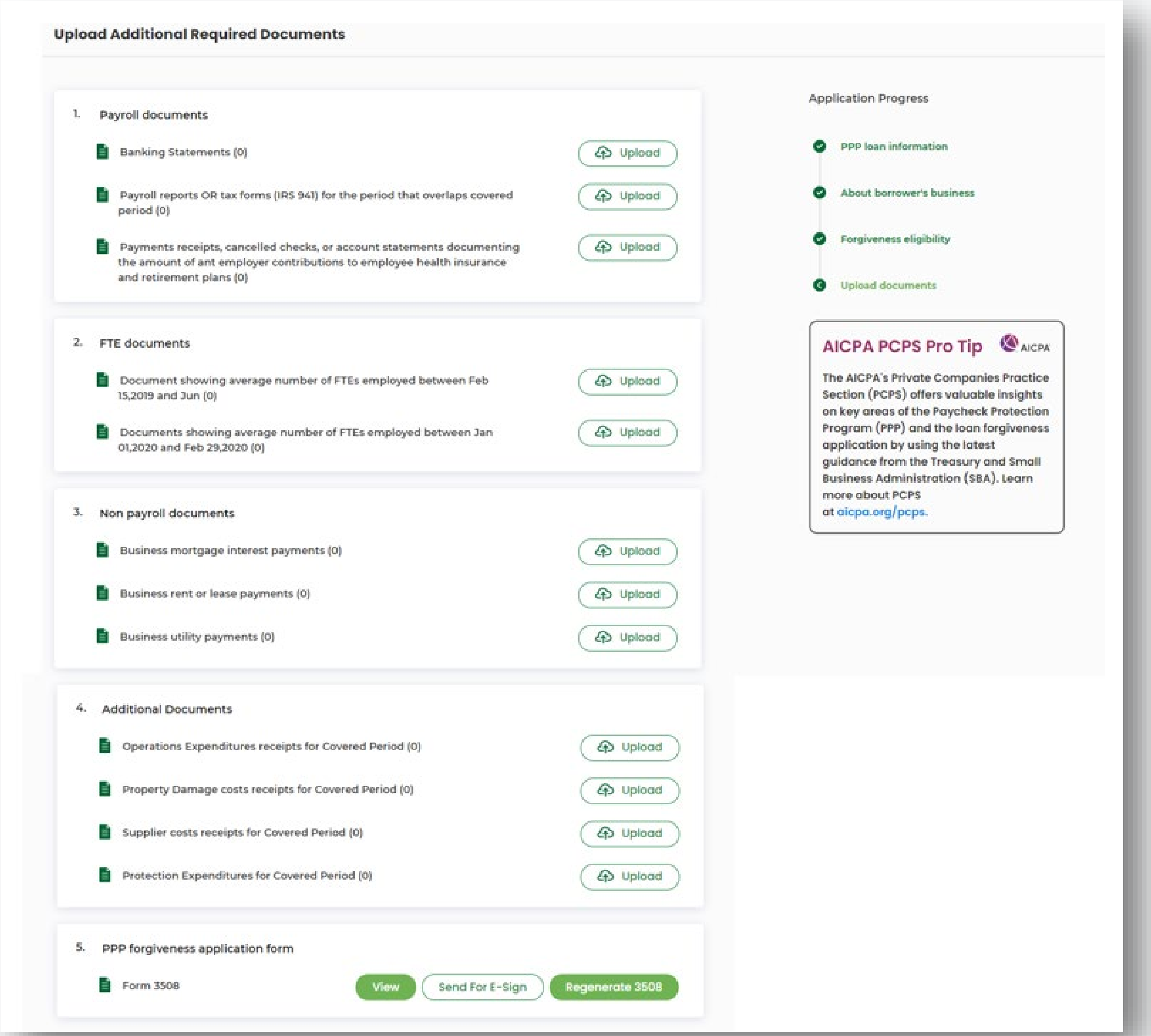
Forgiveness: Documentation

Training Tip:

3508S auto populates in the platform

Prepare:

- Upload all documentation requested and document updates will continue to be pushed to the portal
- Documentation will be dynamic, and an Excel form checklist will be available for firms to download which is coming soon.
- 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

Optimize your CPA **Business Funding** Portal Experience

[Register for a forgiveness best practices session today](#).

Forgiveness Best Practices

Held weekly on **Thursday's** from **2:00 - 3:00 PM ET**, these best practice sessions help your firm understand PPP forgiveness with topics including:

- ✓ Overview of PPP forgiveness
- ✓ Getting started – what you need to know to complete a forgiveness application package
  - Application considerations
  - Borrower information & eligibility
  - Required documentation
- ✓ Resources and guidance

Today's AICPA Town Hall Series

This week's special guest is pricing expert and Chief Value Officer at Armanino, **Ron Baker**, who will advise on:

- ✓ Billing for business relief services
- ✓ Recent advancements in subscription-based pricing

Additionally, CPA.com CEO and President Erik Asgeirsson and AICPA VP of Firm Services Lisa Simpson will share an update on the latest news impacting the profession and an analysis of recent guidance.

Customer Care Reminders

Immediate action is needed if you have a client application with either of these statuses.

Special Outreach to Firms

Communications were sent to firms notifying them of instances where an action could be taken to move a client application to the next step towards funding. Communications related to:

- Applications with a "**Contract Sent**" status – this is the *final* application step and requires a client e-signature *as soon as possible*.

- Applications in "**More Information Needed**" status – check for Underwriter (UW) Notes to understand what is missing or email cpasupport@biz2credit.com to inquire.
    - **Important reminders**:
    - Upload missing information ***directly*** into the Portal. *Do not email* the required documentation to customer care.
        - Email cpasupport@biz2credit.com once the missing information is uploaded so they can notify the Underwriters.

Please *double-check* if you received this email (including spam/junk folders).

➢ The emails came from cpasupport@biz2credit.com

➢ If you have a question about the step you need to take, you can email cpasupport@biz2credit.com

Resource Hubs

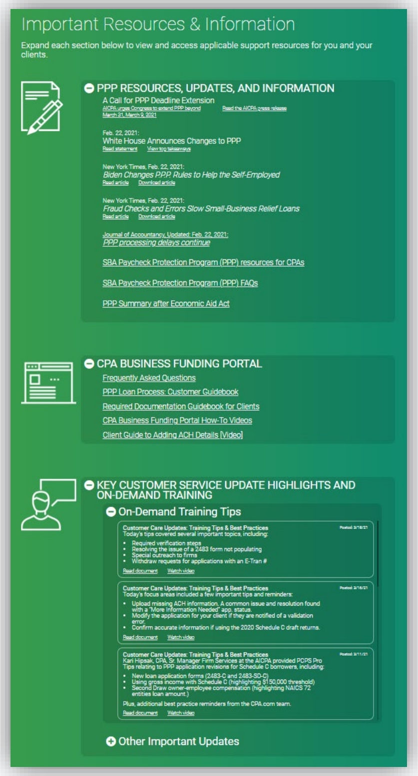
Visit either resource hub for information to help guide you through the second round of PPP

✓ **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

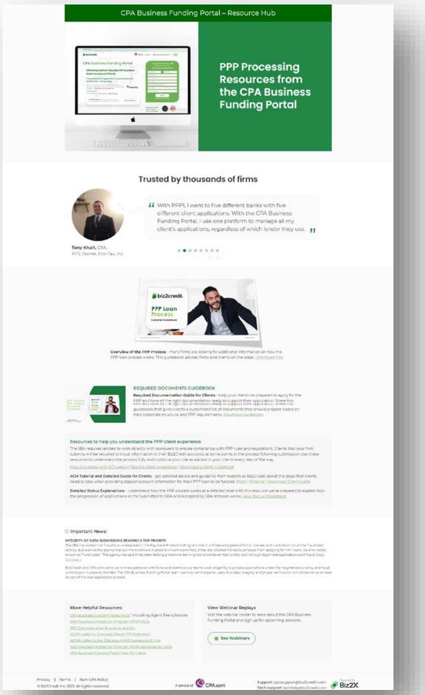
✓ **Semi-weekly webcast resources, such as:**
- Webinar replays
- Access to on-demand training clips and slides (*only* found at CPA.com/PPPResources)

✓ **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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CPA **Business Funding** Portal

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**

Resolutions

>25k

inquiries resolved during PPP so far.

Join us on Thursday at 10am ET