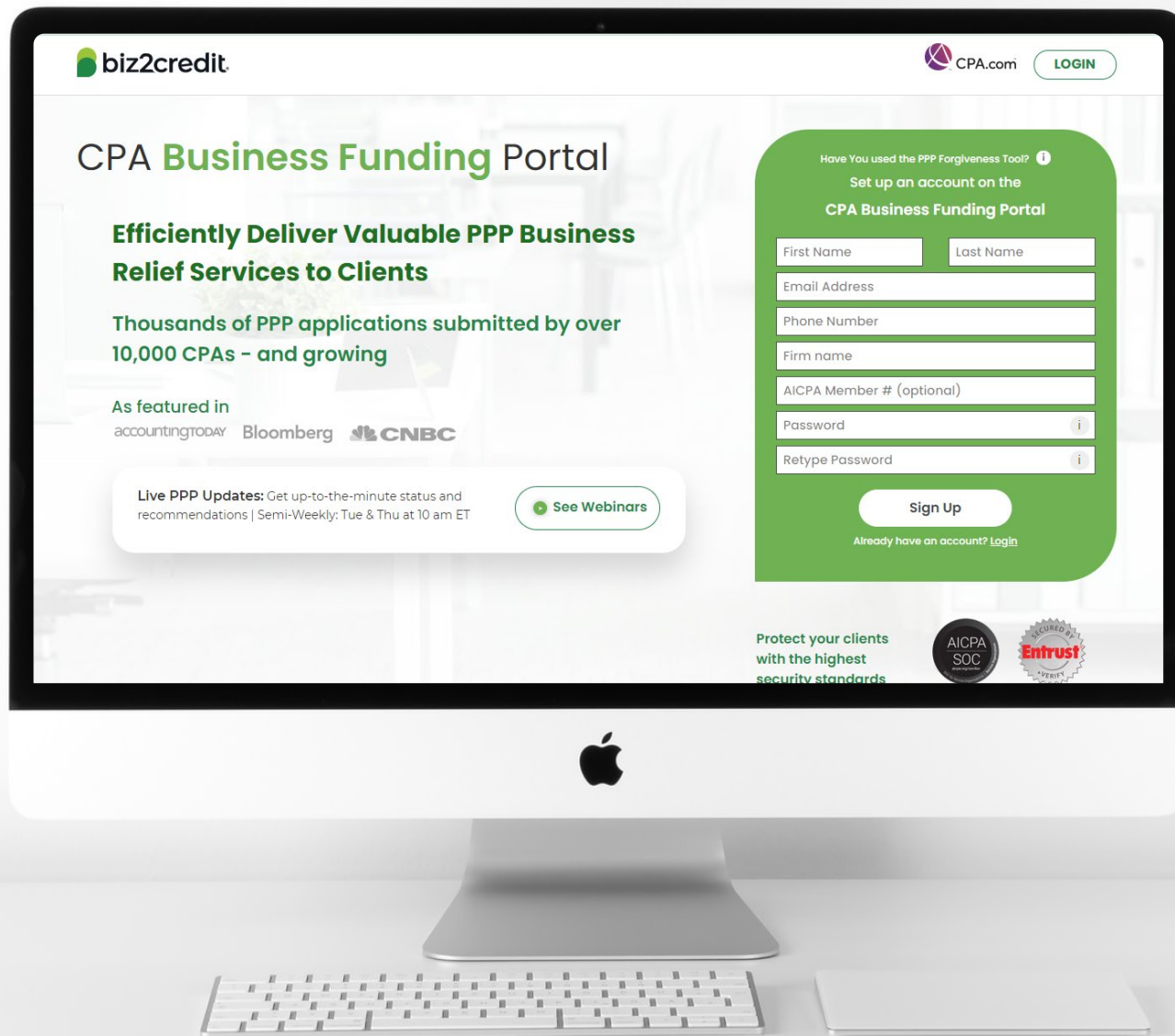




# CPA **Business Funding** Portal

Live PPP Service Updates

June 10, 2021

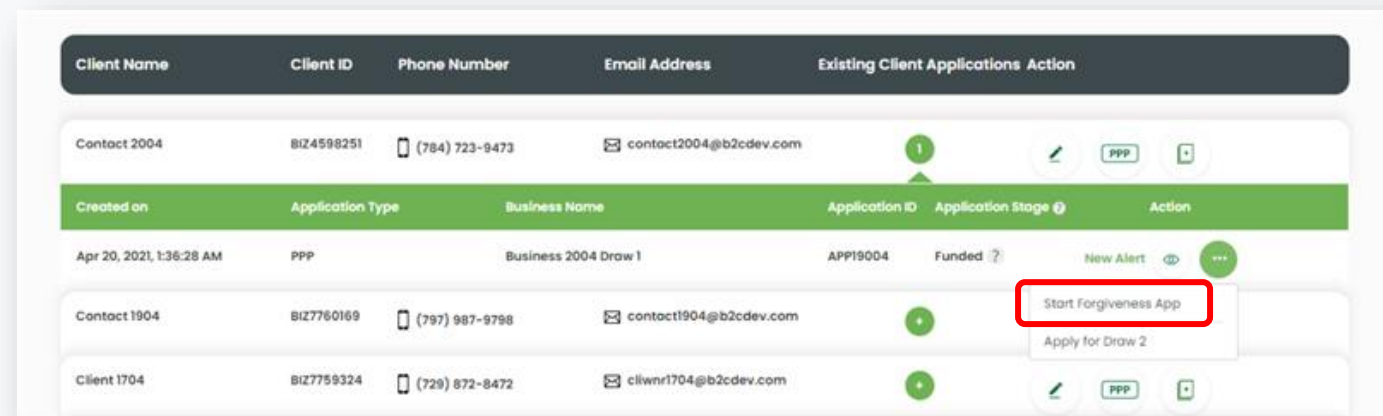


# Customer Care Updates from the CPA Business Funding Portal Team

# 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



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

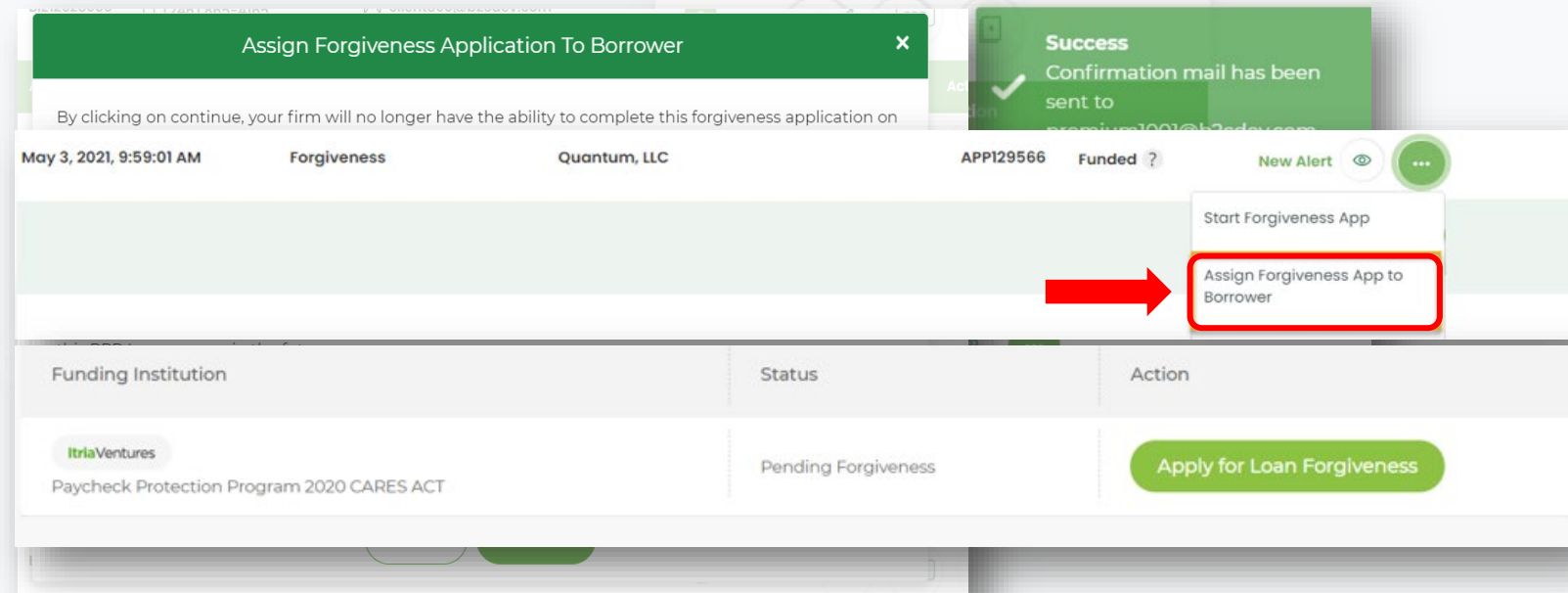
## Go Deeper:

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

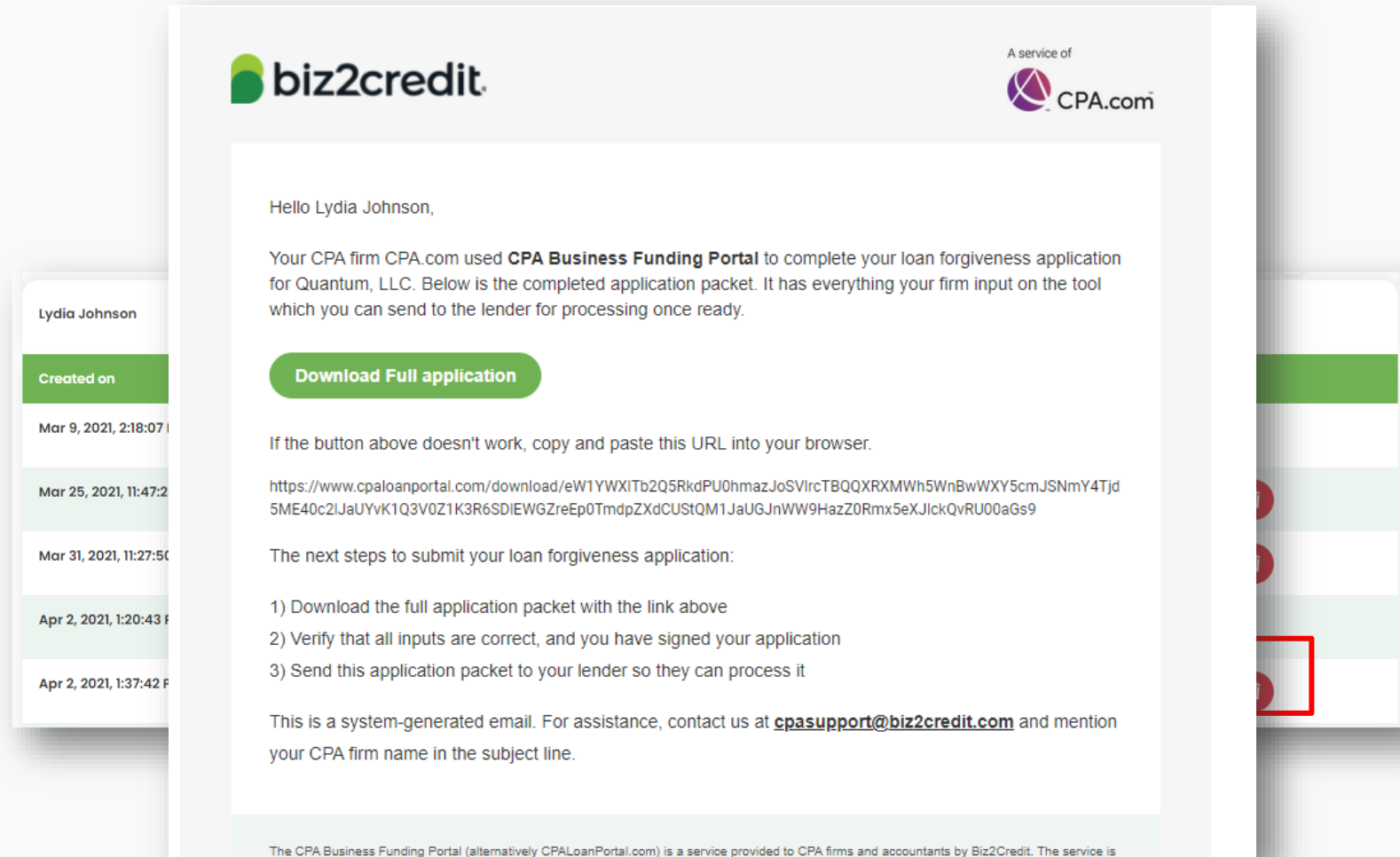
- [CPA Loan Portal How To Videos](#)
- [FAQs in the CPA Loan Portal](#)

# 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 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

# Forgiveness on the Portal

## When and How to Use the Portal for PPP Forgiveness Application(s)

Portal Forgiveness Capabilities	Biz2Credit Funded Loans	Alternate Lender Funded Loans
Assess borrower's eligibility for forgiveness	✓	✓
Prepare a forgiveness application (By the CPA/Firm or Borrower)	✓	✓
Accumulate appropriate documents	✓	✓
Generate an application package for submission to the SBA	✓	✓*
Automatically process an application for submission to the SBA	✗	✗
Check requirements of the submission process for lender's other than Biz2Credit	n/a	✗
Link or connect with other PPP platforms (ex. bank or fintech)	n/a	✗

\*We highly recommend that CPA's & borrower's understand alt. lender needs *prior* to using the Portal for forgiveness. Borrower can generate a package + cover letter for alt. lender then work with Biz2Credit for any additional needs for submission to SBA.

# Forgiveness on the Portal

## CPA Business Funding Portal

### Paycheck Protection Program (PPP) - Forgiveness

*When and how to use the Portal for forgiveness application(s)*

Portal Forgiveness Capabilities	Biz2Credit Funded Loans
Assess borrower's eligibility for forgiveness	✓
Prepare a forgiveness application (By the CPA/Firm or Borrower)	✓
Accumulate appropriate documents	✓
Generate an application package for submission to the SBA	✓
Automatically process an application for submission to the SBA	✗
Check requirements of the submission process for lender's other than Biz2Credit	n/a
Link or connect with other PPP platforms (ex. bank or fintech)	n/a

\*We highly recommend that CPA's & borrower's understand alternate lender needs *prior* to using the Portal for forgiveness. Please contact your alternate lender for a cover letter for alternate lender then work with Biz2Credit for any additional needs for submission to the SBA.

1



## CPA Business Funding Portal

### *Steps to Assign a Forgiveness Application to a Borrower*

Before Assignment to Borrower ~ Borrower / Client View on Biz2Credit Customer Portal

Funding Institution	Status	Action
Biz2Credit	Funded	

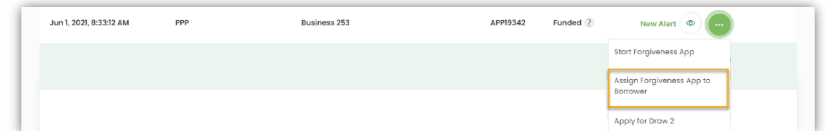
## New resource available!

Understand what you can and cannot use the Portal for with forgiveness as well as access the steps to assigning an application to a borrower.

Access at: [CPA.com/CPABFP-Forgiveness](https://CPA.com/CPABFP-Forgiveness)

## CPA Business Funding Portal

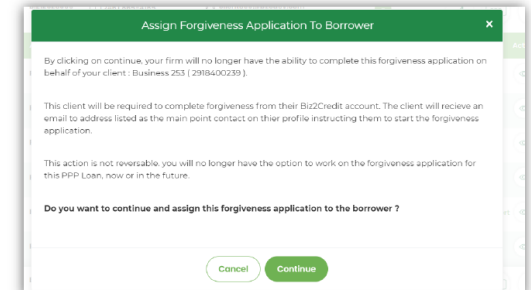
1. Click the 3 ellipses in the CPA firm dashboard > Within the dropdown choose: "Assign Forgiveness App to Borrower"



2. Confirmation Pop-up:

#### Read popup carefully.

By clicking 'continue,' your firm will no longer be able to complete the forgiveness application for your client.



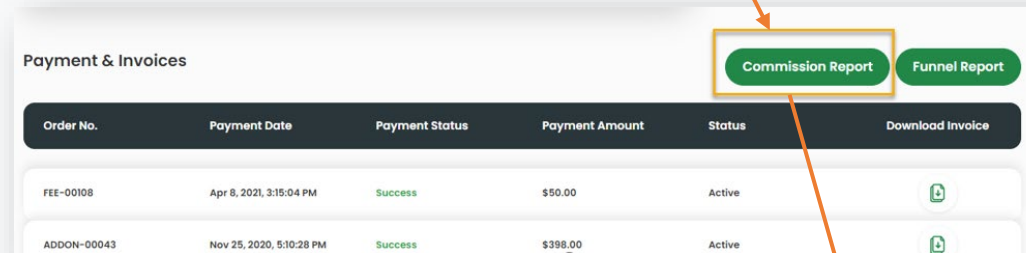
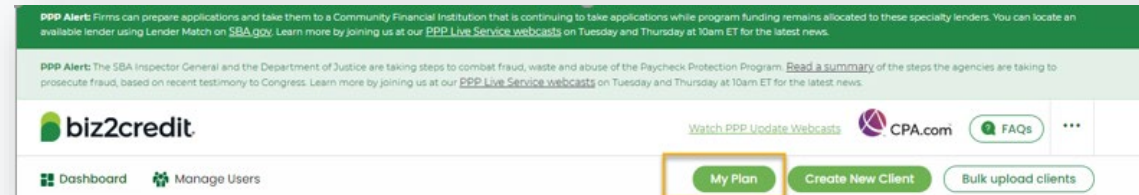
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# Customer Care Reminders

## 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.

# Agent Fees: Opt-out Option



Dashboard

## Commission Report – Pending Final SBA Guidance & Regulation

The following table shows the funded Paycheck Protection Program loans submitted by you and your commission according to the Agent Fee structure provided by the government.

### Confirmation

By clicking on "Continue", you confirm that you will opt out of receiving the commission for this application. This decision is final. You will not be able to change it in the future.

Continue

Cancel

Case ID	SBA Loan Number	Business Name	Lender	Funded Date	Funded Amount	Commission <sup>1</sup>	Opt-in
APP18066	7987	Test Businessskjhdfjkhfndsl	Itria Ventures	02/08/2021	\$798,798.00	\$3,993.99	<input checked="" type="checkbox"/>
Total					\$798,798.00	\$3,993.99	

1. Agent fees are set by the Treasury Department and currently set so they may not exceed One percent (1.00%) for loans of not more than \$350,000; 0.50 percent for loans of more than \$350,000 and less than \$2 million; 0.25 percent for loans of at least \$2 million; for Loans under \$50,000, it is expected that the fee will be based on the lesser of either \$500 or 10% of the loan amount.

**Setup Bank Accounts to Receive Payments-** The commissions due to your firm will be deposited at the conclusion of the program. Add your firm's bank account details below to ensure you receive timely payment of commissions. If you do not add your account details payment may be delayed.

Add Account

Back to My Plan

# 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:**

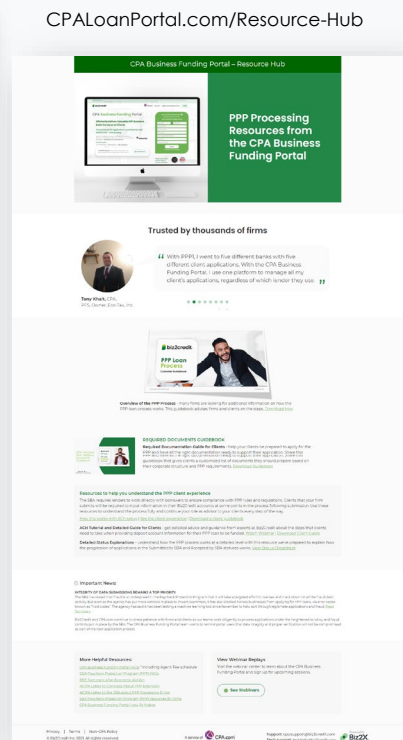
- How-To Videos
- Access to FAQs (also found at: [CPALoanPortal.com/#PPPFAQ](https://CPALoanPortal.com/#PPPFAQ))
- Required Documentation Guide
- ACH Tutorial and Detailed Guide

✓ **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*



# 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 on Thursday's for these  
**live update webinars**

## Faster Processing

~600

inquiries answered  
every day.

Join us on Thursday at 10am ET