BUSINESS PARTNER PORTAL

USER GUIDE

October 22, 2020

OFFICE OF THE BUDGET BUSINESS PARTNER PORTAL USER GUIDE

1. INTRODUCTION

The Office of the Budget Business Partner Portal is an application presented by the Office of the Budget to allow Business Partners to quickly and easily find important information regarding such services as Borrower Loans reports, Vendor reports, Contract information, Customer information and much more. Currently, only Borrower Loan report services are available, but check back in the future for more services that will be added periodically to the Business Partner Portal.

The Business Partner Portal also contains a Contact Us section if you need assistance. Contact Us provides contact information for Office of the Budget personnel who specialize in the services offered through the Business Partner Portal.

2. KEY ABBREVIATIONS

The following is a list of important terms and abbreviations that are used throughout this document. This section can be used as a reference if you do not understand the abbreviations used.
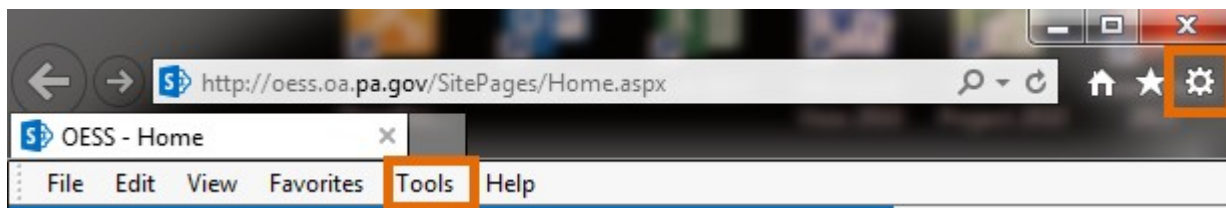
    a. OB – Office of the Budget
    b. BPP – Business Partner Portal
    c. CV – Compatibility View
    d. Browser – The software used to open websites
    e. IE – Microsoft Internet Explorer
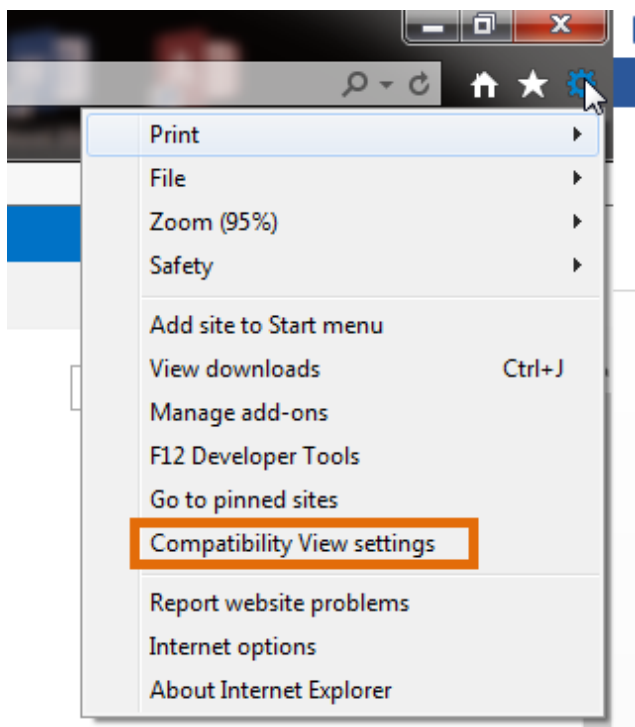
3. COMPATIBILITY VIEW

The Business Partner Portal (BPP) is optimized to be used with the most recent versions of the major Windows-compatible browsers (Chrome, Firefox and IE). If you are using IE, you must first make sure that IE has not been told to act as though it is a previous version. For example, you may have IE 11 installed on your workstation. However, there is an option in IE that tells it to run as though it were IE 8 or IE 9. That option is called Compatibility View (CV). In order to get the most out of the BPP, you must first make sure that your IE has its CV turned off and will therefore act as an installation of IE 11. Follow the instructions below to turn your CV off.
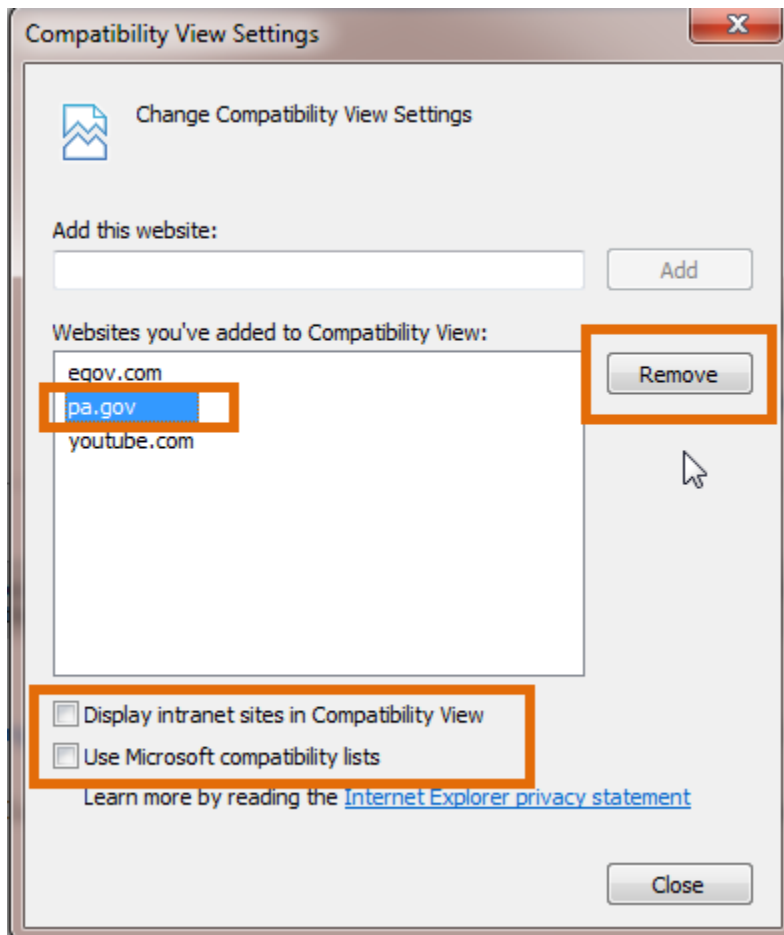
    a. Open your IE browser

b. Open the Tools menu by either clicking Tools in the menu bar or clicking the Settings button in the top right of the browser window, as shown below in the orange rectangles.

c. Choose Compatibility View settings. The image below shows where this is if you click the Settings button. The same option is in the Tools menu.

d. In the Compatibility View Settings window, make sure both checkboxes are cleared. There should be no check mark in either of them. Also, make sure that the Website "pa,gov" has not been added. If it has been, highlight "pa.gov" and click the Remove button.

e. Your browser should automatically convert to the new setting. If it does not, you can close and reopen your browser. The new browser window will no longer be using CV and will act as though it is the installed version of IE rather than a previous version.
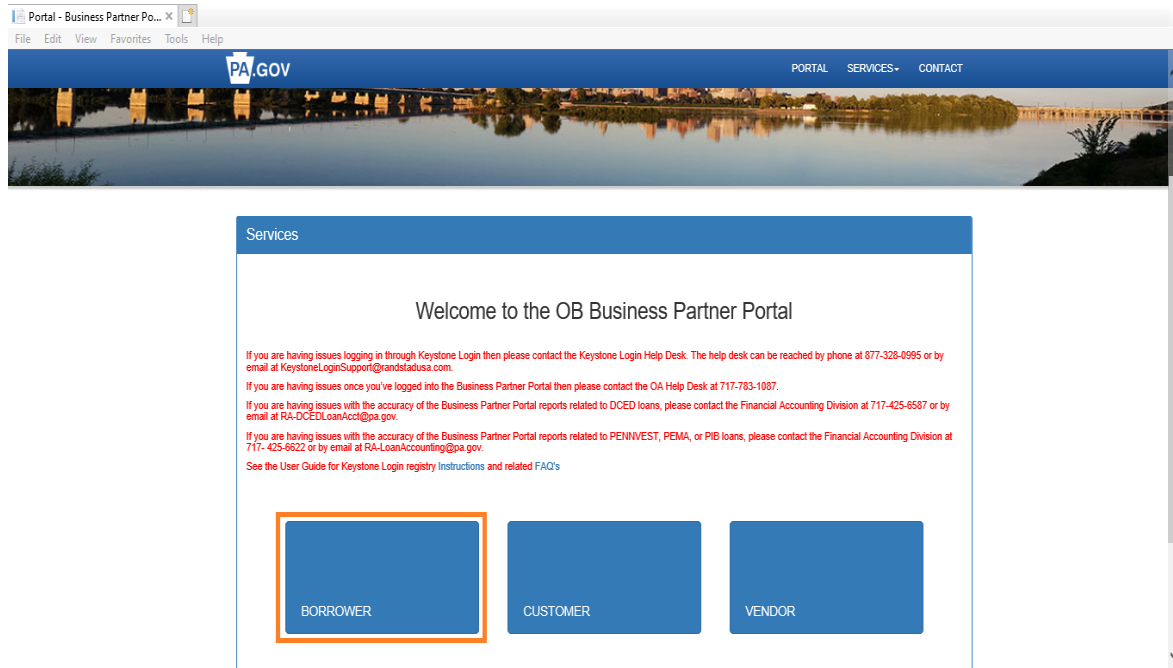
4. KEYSTONE LOGIN REGISTRATION

Keystone Login is an account management system for the Commonwealth of Pennsylvania online services. There are several different credentials you may input into the Keystone Login page allowing you access to BPP.

If you currently have a KeystoneID account, then that account's keystoneid value may be used in the Keystone Login usename input box and the password value may be used in the Keystone Login password input box. However, if these values do not allow you to enter BPP then please create a new Keystone Login account (see step c in this Section).

Keystone Login was built allowing it to use a Commonwealth's employee's CWOPA account. You can use your CWOPA ID and CWOPA Password to validate thru Keystone Login and access BPP.

Alternatively, you can create a Keystone Login account.

   a. Open your browser and navigate to https://www.bpp.ob.pa.gov, then click on the Borrower box as shown below in the orange rectangle.

b. You will be redirected to the Keystone Login page.

If you are a Commonwealth employee with a CWOPA account, you can enter your CWOPA ID in the Username box and your CWOPA Password in the Password box. (Disregard the Register tab highlighted below.)
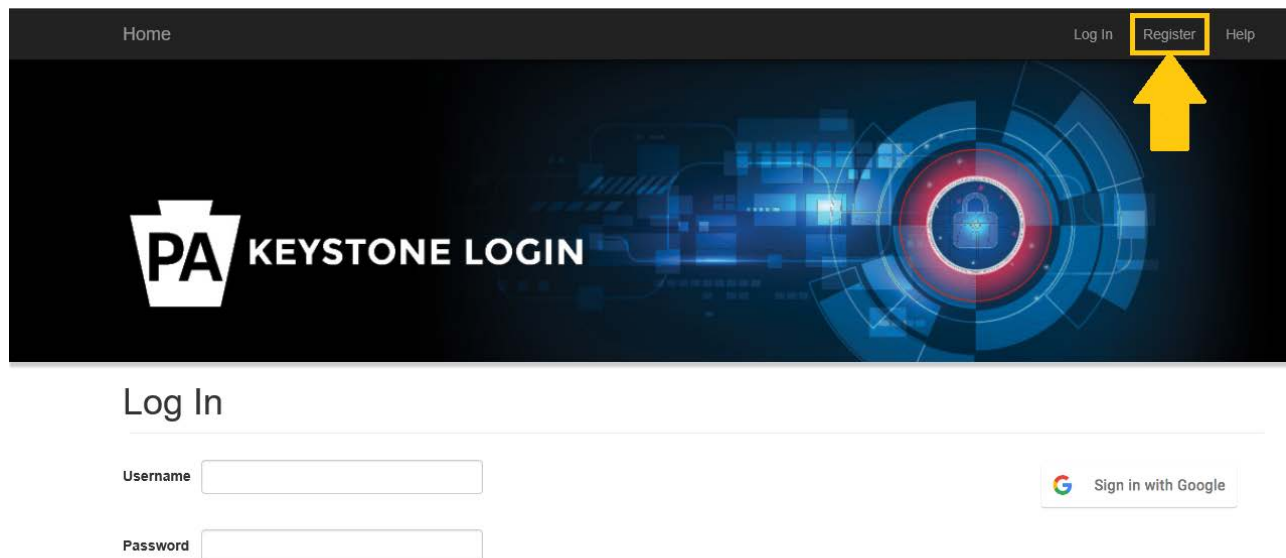
If you have a KeystoneID account, you can enter your keystoneid in the Username box and your KeystoneID Password in the Password box. (Disregard the Register tab highlighted below.)

Once your credentials have been validated by Keystone Login and if this is your first time entering BPP, the Create User Profile page will be displayed. (skip to step c in Section 5)

If you have already created a BPP User Profile account, the Borrower Services page will be displayed. (skip to step f in Section 5)

If you do not have a CWOPA account or you are creating a Keystone Login account, please view the following instructions.

c. Click the Register link as shown below.

d. Follow the instructions on the Keystone Login Register screen to create your Keystone Login. If you have a current Pennsylvania Identity Exchange Keystone ID account and wish to keep your current Business Partners, input the same first name, last name and email address as in your Keystone ID account. Click the Register button when you are finished.

e. A success message will appear if your Keystone Login was successfully created.
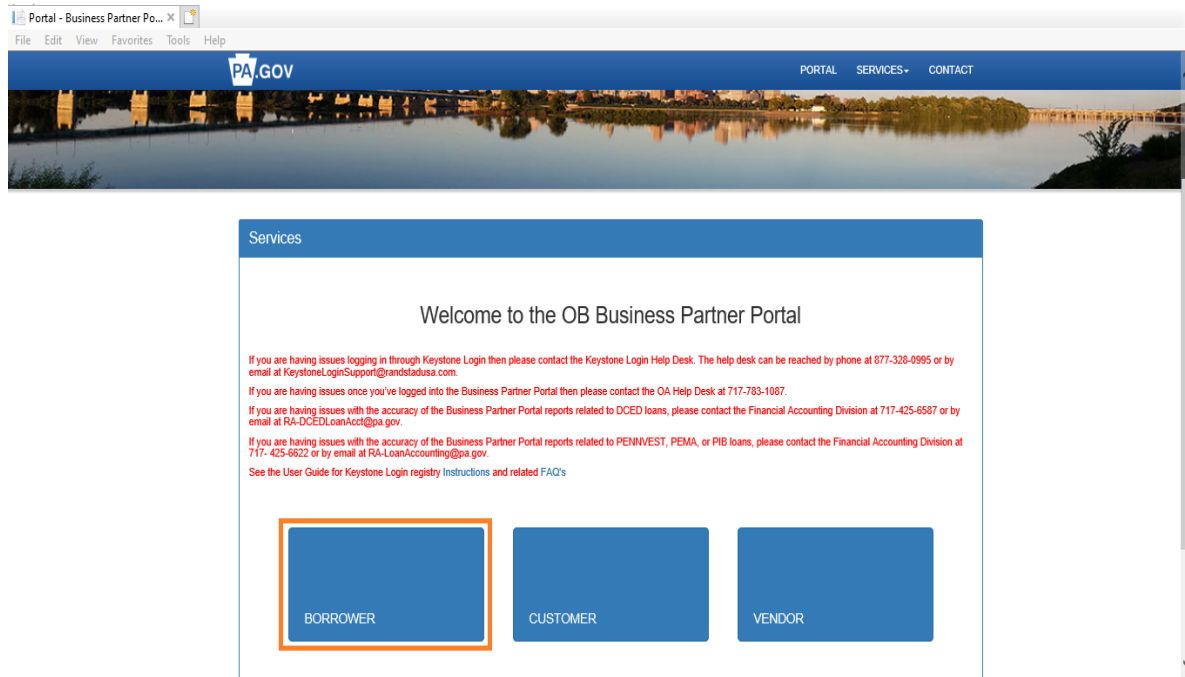

This concludes the one-time Keystone Login registration process. From this point on, when you want to go to the BPP, you will only need to log in to the Keystone Login page, you will not need to register again.
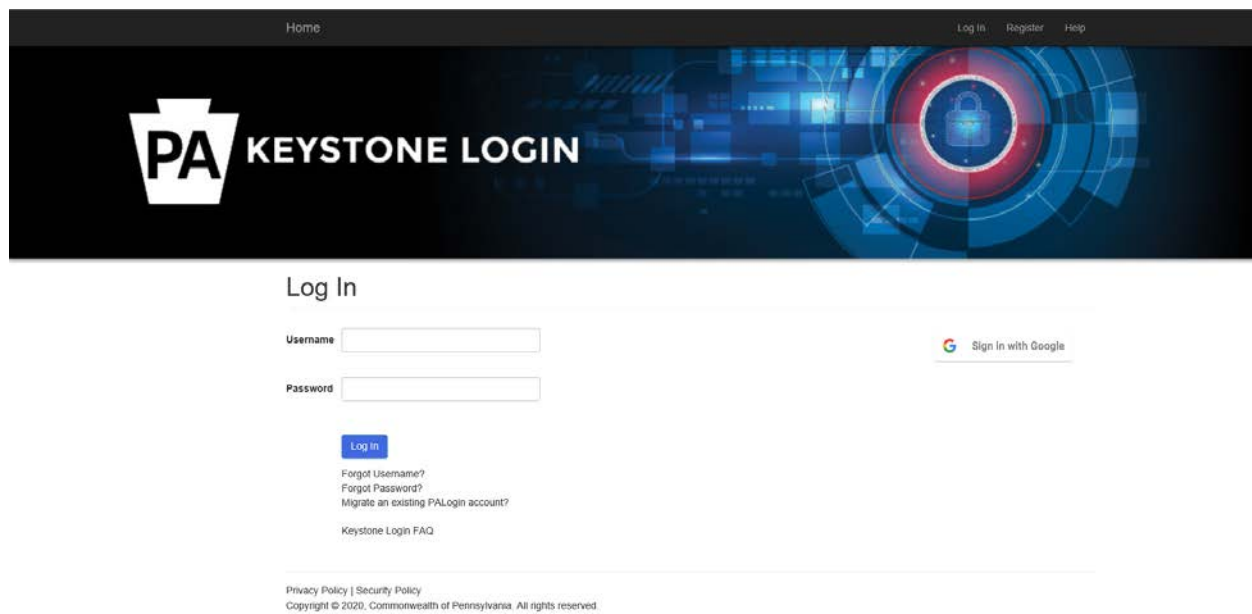
5. USING THE PORTAL AS A BORROWER

As mentioned in the Introduction, OB intends on using the BPP to extend many different services to different business partner groups. For this first installment of the BPP, the only service available is the Borrower service, which allows Borrowers to run loan reports.

As services are added to the BPP, additional sections will be added to this User Guide to instruct you how to use those services. To use the BPP for Borrower services, please follow the steps below.

a. Open your browser and navigate to https://www.bpp.ob.pa.gov, then click on the Borrower box as shown below in the orange rectangles.

b. You will be redirected to the Keystone Login page. Enter your Keystone Login username and password <u>or</u> your CWOPA ID and CWOPA Password or your KeystoneID, KeystoneID and Password then click the Log In button.

c. The first time you log into the BPP, you will need to enter some additional information so that the BPP knows what information to show to you. Enter the required information (all fields with a red notice to the right are required). You do not need to enter First Name, Last Name and Email. They will be preloaded with information sent over by the Keystone Login. After you enter your information, click Save. Please note, you need to only input and save this information one time. You do not have to click this Save button each time you input Business Partner information in the next section.

Please update your profile and save changes by clicking the 'Save' icon below.

First Name	Billie Jo	
Middle Initial		
Last Name	Snyder	
Suffix		
Job Title		The Job Title field is required.
Address Line 1		The Address Line 1 field is required.
Address Line 2		
City		The City field is required.
State		The State field is required.
Zip Code		The Zip Code field is required.
Email	bisnyder@pa.gov	
Work Phone		The Work Phone field is required.
Cell Phone		

Save

d. When you have successfully entered your profile data, the Business Partners section will appear below the Profile section. This is where you identify, using TIN numbers and LOAN numbers in proper combinations, the Business Partner(s) that you are associated with. Enter TIN number and LOAN number, then click the Authenticate button.

Business Partners

To validate and add a business partner, please provide a loan number and the corresponding business partner taxpayer identification number (TIN). Enter this information below and click the 'Authenticate' icon. Upon authentication, you may view all loans associated with the business partner; however, you must repeat the authentication process if you wish to add multiple business partners to your list.

Enter TIN number :

Enter loan number associated with TIN number :

Authenticate

e. If you successfully entered a TIN/LOAN combination, the exterior of the Business Partners box will turn green, a message will appear confirming you successfully added a valid Business Partner, and the name of the partner will show to the left of the screen, as shown below. If the combination you entered is not valid, the exterior of the Business Partners box will turn red, a message will appear confirming that the combination was not valid and no new Business Partner will be added to the left side of the screen, as shown below. Click the Save button to save your profile changes.

Business Partners

Test Business Partner ✖

To validate and add a business partner, please provide a loan number and the corresponding business partner taxpayer identification number (TIN). Enter this information below and click the 'Authenticate' icon. Upon authentication, you may view all loans associated with the business partner; however, you must repeat the authentication process if you wish to add multiple business partners to your list.

Enter TIN number :

Enter loan number associated with TIN number :

Authenticate

👍 Valid Business Parter

f.   Steps b, c and d are only necessary the first time you login to the BPP. After your first login, steps b, c and d are skipped, and you will immediately go to the next screen shot in this step. However, if you need to make changes to your user profile or to the Business Partners you are validated to be associated with, you can click the Edit Profile button on this screen.

g. It is a 2-step process to run a report for a Business Partner in the BPP. First, you must select which Business Partner since some users can be associated with more than one Business Partner. Choose the Business Partner from the drop-down box, and click Select

h. Second, you need to choose the Report Type (left side) and Loan (right side). You can only choose one Report Type at a time, but you can choose multiple Loans if the Business Partner has more than one loan. Choose your Report Type and Loan and click the Run Reports button.

Business Partner Loan Report Selection

Choose the loans and types of reports you wish to view. You may select multiple loans to view.

☐ Payment History & Open Items Report

☐ Amortization Schedule

☐ Both Payment History & Open Items Report, And Amortization Schedule

☐   Borrower Name | Loan Number

☐ Borrower Name: Test Business Partner
   Loan Number: P12345678-123
   Role Type: Main Loan Partner   Status: Active

Run Reports

i. You can now view the loan report on screen. Scroll up and down to view more information. If you chose more than one loan, there will be Next previous buttons to allow you to navigate between loans. Click on Export Options to print. If you chose more than one loan, you can choose to print one loan or print all.

Export Options ▾

Export Single Loan Report to Excel
Export All Loan Reports to Multiple Excel Files
Export All Loan Reports to Single Excel File
Export Single Loan Report to PDF
Export All Loan Reports to Multiple PDF Files
Export All Loan Reports to Single PDF File

BORROWER DETAILS

Agency Name:	Loan Number:
Project Number:	Legacy Loan Number:
Borrower Business Partner # / Name:	
Certified Provider # / Name:	
Program Name:	

LOAN DETAILS

Loan Close Date:	Amortization Date:
Maturity Date:	Amortization Status:
Payment Interval:	ACH Repayment Status:
Loan Term:	Number of Remaining Payments:
Current Interest Rate:	Calculation Base:
Current Annuity Amount:	Next Scheduled Annuity Payment Due:
Bankruptcy:	

DISBURSEMENT DETAILS

Loan Amount:	Total Loan Disbursements To-Date:
Current Contract Capital:	Total Capitalization of Overdue Items:
Grant Amount:	Total Grant Disbursements To-Date:
Principal Forgiveness Amount:	Total Principal Forgiveness Disbursements To-Date:

PAYMENT DETAILS

Date Last Payment Received:	Amount of Last Payment Received:
Paid To Date:	Total Open Items:
	Current Outstanding Principal Balance:

Remaining Amortization

Date Due	Total Payment	Interest	Principal	Projected Balance