BUSINESS PARTNER PORTAL
USER GUIDE

June 30, 2016

OFFICE OF THE BUDGET BUSINESS PARTNER PORTAL USER GUIDE

1. INTRODUCTION

The Office of the Budget Business Partner Portal is a new 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. KID – Keystone ID
   d. CV – Compatibility View
   e. Browser – The software used to open websites
   f. 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.
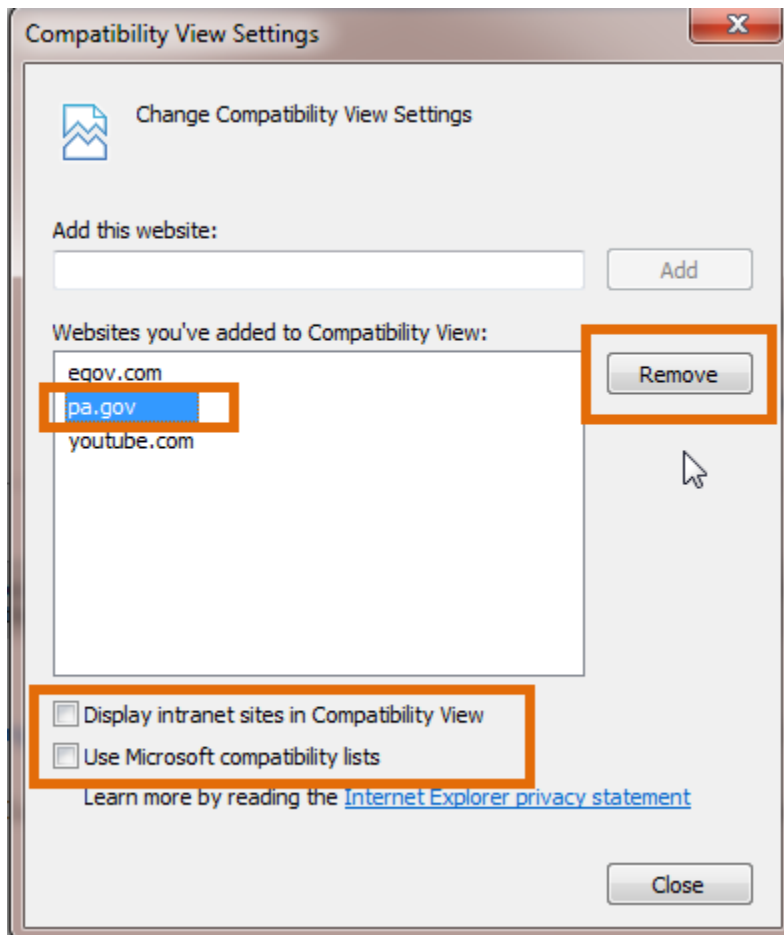
   a. Open your IE browser

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.
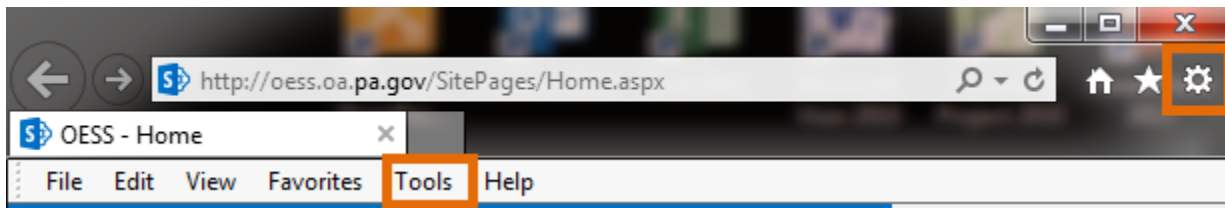
c. Choose Compatibility View settings. The image below shows where this is if you click the Settings button. The same option is in the Tools menu.
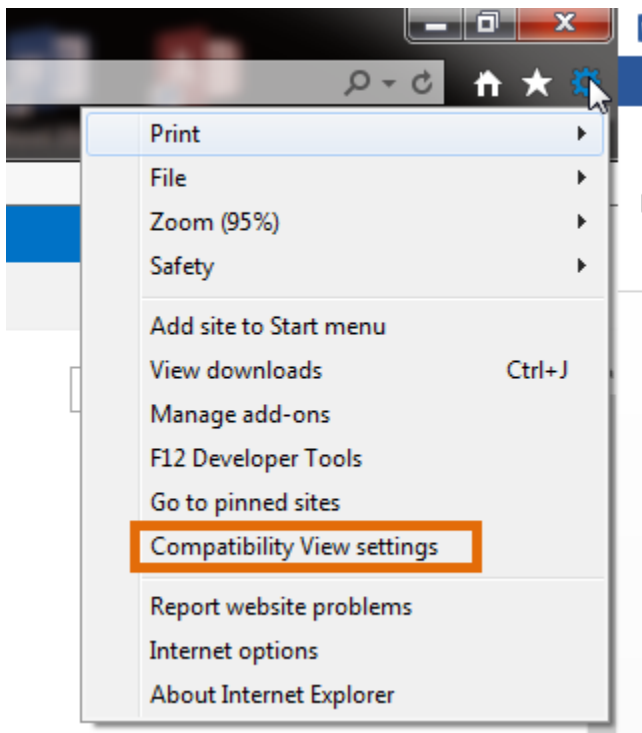
d. In the Compatibility View Settings window, make sure both of the checkboxes are cleared. There should be no check mark in either of them. Also, make sure that the Website "pa,gov" has not been added. If it has been, highlight "pa.gov" and click the Remove button.


e. Your browser should automatically convert to the new setting. If it doesn't, 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.
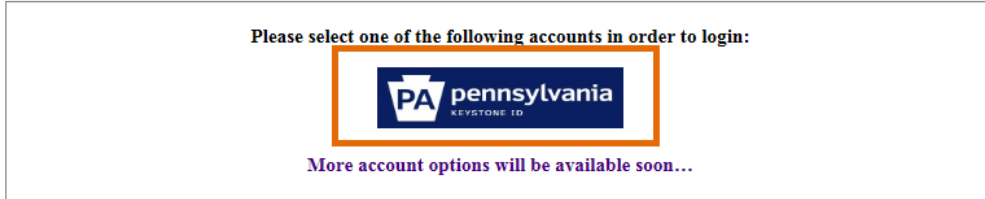
4. KEYSTONE ID REGISTRATION

The Keystone ID (KID) is a Commonwealth-wide initiative to allow citizens to be able to sign in to any Commonwealth application using the same username and password combination. Not all Commonwealth applications use the KID yet, but the intention is to, over time, replace existing login processes so that all applications use KID. The BPP is one of the early adopters of KID. This may be your first time using an application that is integrated with KID. If it is, you will need to register. Registration is a one-time only activity, going forward when you use the BPP you will only need to login, you will not need to register again. Follow the instructions below to register in KID.

    a. Open your browser and navigate to https://www.bpp.ob.pa.gov, then click on the Borrower box or choose Borrower from the Services drop down in the top navigation bar as shown below in the orange rectangles.
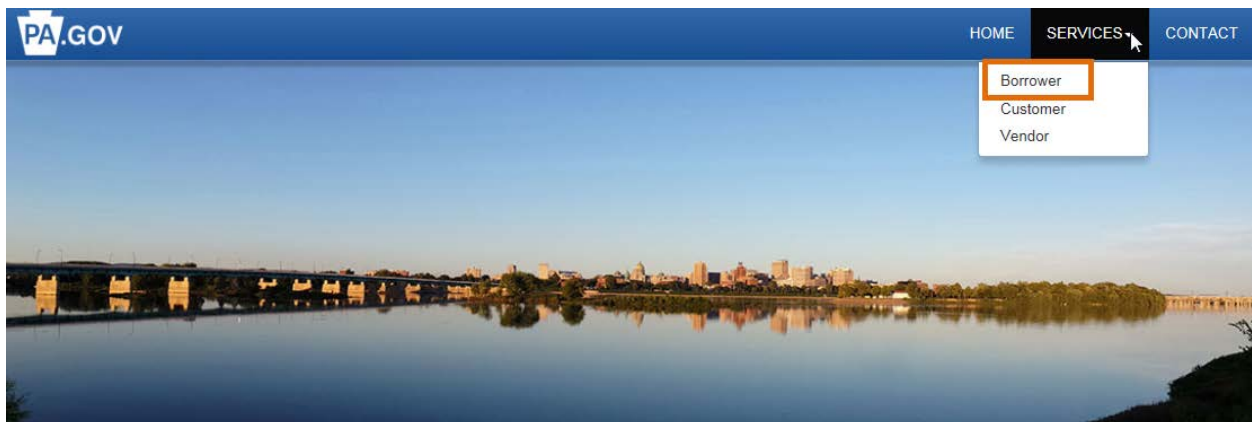
b. You will be redirected to Commonwealth of Pennsylvania Identity Exchange page. Click on the Pennsylvania Keystone ID image as shown below.

Welcome to the Commonwealth of Pennsylvania Identity Exchange

Please select one of the following accounts in order to login:

More account options will be available soon…

New User? If you do not have an existing account, click one of the account options above to navigate on to the next page. You will have the opportunity to enroll by clicking 'New User' on the next page.

c. On the Keystone ID page, click the New User box as shown

d. On the Keystone ID General Information page, click Next

e. Follow the instructions on the Keystone ID Profile Information screen to create your Keystone ID and click the finish button when you're done.

PA pennsylvania

Create Keystone ID NSTIC: Profile Information

| 1 ⇨ General Information | 2 ◁ Profile Information |

· = Required

To create a new Keystone ID, please provide the following information:

· Keystone ID _____ (must be 6 to 10 characters)

· First Name _____

· Last Name _____

· E-mail _____

· Confirm E-mail _____

Security Question

To ensure online security, please select and provide answers for security questions. These questions will be used if you forget your password.

Security Question Tips:
Choose questions for which you will easily recall the answers; do not write down the questions and answers, as this undermines their usefulness as a security tool. Answers must be typed exactly the same way, every time. So, if you capitalize "Philadelphia" or if you write "Philadelphia PA" here, you must do so every time you use the question. Avoid using special characters ($#%@) and punctuation (" , - .) in your answers. You cannot use the same question more than once. Answer cannot contain any phrase of the question.

· Security Question 1   [Please select a security question ▾]

· Answer   [_____]

· Security Question 2   [Please select a security question ▾]

· Answer   [_____]

· Security Question 3   [Please select a security question ▾]

For security reasons, please answer the following question.

Question   Which of the following is NOT a day of the week: Tuesday, Saturday, train, Sunday?

· Answer   [_____]

To review the Privacy Policy, please click here.

[BACK] [FINISH] [CANCEL]

f.   A Congratulations message will appear if your Keystone ID was successfully created. You should receive an email at the address that you entered on the previous page. You can click the Close Window button on this screen.

PA pennsylvania

Congratulations!

You have successfully completed the enrollment for a Keystone ID.

What happens next? Within the next 5 minutes, you will be receiving two e-mails from Commonwealth of Pennsylvania. One e-mail will confirm your Keystone ID with Commonwealth of Pennsylvania, the other will provide a temporary password which you will use for setting your permanent password. You will be required to set your permanent password for future use before your first login.

If you are not receiving emails from Commonwealth of Pennsylvania, please check your email account's "Spam" or "Junk" folders to ensure the message was not filtered. For any questions or issues, please e-mail PW.OIS.AccountAdministration@pa.gov.

Note: Please make sure to first set your permanent password by clicking on the "Set Permanent Password" link in the email that you will receive shortly.

[Close Window]

g.   When you receive the email, click on the link in the email called Set Permanent Password

Action Items

Please do not reply to this e-mail, all replies are sent to an unmonitored account.

PA pennsylvania
KEYSTONE ID

Thank you for creating a Keystone ID with the Commonwealth of Pennsylvania. Your temporary password is 0520%ax%3e

Before you proceed to login into the application, please set your permanent password by clicking the following link **Set Permanent Password**

Note: The Commonwealth of Pennsylvania is improving how it provides online services to citizens and is pleased you are taking advantage of the Keystone ID to access multiple state agency sites as a way of simplifying your experience.

You are now able to use your Keystone ID on state agency sites who have the Keystone ID logo. **PA** pennsylvania

Reminder: If you change any of your profile information (e.g., password) on the participating Commonwealth of Pennsylvania state agency sites, the changes will apply to your Keystone ID for all participating sites.

h. Enter the KID you created in step "e", and the temporary password from the email in the previous step and click the Login button

i. When the Set Permanent Password screen opens up, follow the guidelines at the bottom of the screen to set your permanent password, and then click the Submit button.

j. If you have successfully set your permanent password, a Congratulations message will appear. Click Close Window, and close your browser by clicking the Red X in the upper right hand corner of the browser window.

Congratulations!

You have successfully set a personal password for your Keystone ID!

Please click the Close Window button and login to your application with your personal password.

<div style="text-align: right;">

Close Window

</div>
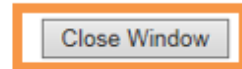
This concludes the one-time Keystone ID registration process. From this point on, when you want to go to the BPP, you'll only need to log in to the KID, you won't need to register again.

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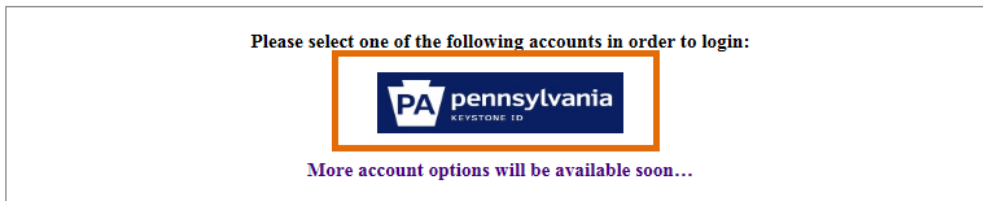
As services are added to the BPP, additional sections will be added to this User Guide to instruct you how to use those services. To use the BPP for Borrower services, please follow the steps below.

a. Open your browser and navigate to https://www.bpp.ob.pa.gov, then click on the Borrower box or choose Borrower from the Services drop down in the top navigation bar as shown below in the orange rectangles.

a. You will be redirected to Commonwealth of Pennsylvania Identity Exchange page. Click on the Pennsylvania Keystone ID image as shown below.

b. Enter your Keystone ID and password on this screen, and then click Login

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 don't need to enter First Name, Last Name and Email. They will be preloaded with information sent over by the Keystone ID. After you enter your information, click Save.

PA.GOV   HOME   SERVICES▾   CONTACT

Create User Profile

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've 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, and click the Authenticate button.

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.

f. Steps c, d and e are only necessary the first time you login to the BPP. After your first login, steps c, d and e 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's a 2 step process to run a reports for a Business Partner in the BPP. First, you have to 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.

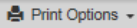| ☐ Payment History & Open Item Report |
| ☉ Amortization Schedule |
| ☐ Both Payment History & Open Items Report, And Amortization Schedule |

☐	Loan Number	Role Type	Loan Status
☑	P31000106-201	Main Loan Partner	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 Print Options to print. If you chose more than one loan, you can choose to print one loan or print all.

🖨 Print Options ▾

Print Single Loan Report
Print All Loan Reports

Commonwealth of Pennsylvania
Financial Accounting
Amortization Schedule

BORROWER DETAILS

Agency Name:	PA Emergency Management Agency	Loan Number:	P31000106-201
Project Number:		Legacy Loan Number:	0010155
Borrower Business Partner # / Name:	0000601785 / UNITY TWP VFC #6 OF MARGUERITE		
Certified Provider # / Name:			

LOAN DETAILS

Loan Close Date:	04/27/2005	Amortization Date:	00/00/0000
Maturity Date:	05/01/2020	Amortization Status:	
Payment Interval:	Monthly	ACH Repayment Status:	
Loan Term:	180	Number of Remaining Payments:	46
Current Interest Rate:	2.0	Calculation Base:	360/360
Current Annuity Amount:	$1,029.61	Next Scheduled Annuity Payment Due:	07/01/2016

DISBURSMENT DETAILS

Loan Amount:	$160,000.00	Total Loan Disbursements To-Date:	$160,000.00
Grant Amount:	$0.00	Total Grant Disbursements To-Date:	$0.00
Principle Forgiveness Amount:	$0.00	Total Principal Forgiveness Disbursements To-Date:	$0.00
		Total Capitalization of Overdue Items:	$0.00

PAYMENT DETAILS

Date Last Payment Received:	10/22/2015	Amount of Last Payment Received:	$11,791.59
Paid To Date:	11/01/2013	Total Open Items:	$28,727.35
		Current Outstanding Principal Balance:	$74,738.98

Date Due	Total Payment	Interest	Principal	Projected Balance
07/01/2016	$1,029.61	$124.56	$905.05	$46,588.89
08/01/2016	$1,029.61	$123.06	$906.55	$45,682.34
09/01/2016	$1,029.61	$121.55	$908.06	$44,774.28
10/01/2016	$1,029.61	$120.03	$909.58	$43,864.70
11/01/2016	$1,029.61	$118.52	$911.09	$42,953.61
12/01/2016	$1,029.61	$117.00	$912.61	$42,041.00
2016 Totals	$6,177.66	$724.72	$5,452.94	
01/03/2017	$1,029.61	$115.48	$914.13	$41,126.87
02/01/2017	$1,029.61	$113.95	$915.66	$40,211.21