



U.S. Small Business
Administration

**Partner Information Management
System (PIMS)
Access and Update Guide**

What is PIMS?

- The Partner Information Management System (PIMS) is an application within the SBA’s Capital Access Financial System (CAFS) that serves as a database for the capture and maintenance of contact information for stakeholders of the SBA’s loan programs.
- The previous Fiscal Transfer Agent (FTA), Colson did not leverage PIMS for the maintenance of 7(a) loan program and secondary market contact information however the new FTA does, given the transition to storing all 7(a) program data, applications, and systems within CAFS to improve security and integration.
- Having detailed, accurate, and up-to-date contact information is critical for the delivery of 7(a) program and secondary market participants news, information, and updates.
- It is therefore critical that *all* participants of the 7(a) loan guaranty program and secondary market access PIMS to add, update, or validate their contact information.
- When updating the information in PIMS, please ensure to select the applicable “SBA Role” to enable the SBA and FTA in reaching out to the appropriate point of contact.



Step 1: Request Access to PIMS

Authenticate your Account

Instructions

- Go to the **Capital Access Financial System (CAFS)** home page: <https://caweb.sba.gov/>
- Enter your User ID and Password to log in to your CAFS Account
If you do not yet have a CAFS Account, instructions on set up can be found on the [FTA Wiki](#)
- Check the box next to **“I agree to these terms”** and click **“Login”**
- You will be asked to authenticate using a PIN
You can receive by text, call, or email (select your preferred option). You must authenticate by PIN for your account to be considered fully active

Capital Access Financial System x +

1 caweb.sba.gov/cls/dsp_login.cfm

SBA Account Login

Not Enrolled?
Forgot Password?
Forgot Username?

2

ExampleUser

.....

Show/Hide Terms and Conditions

3 *I have read and agreed to the terms above.

Login

SBA Account Authentication

Skip PIN and take me to home page >

4 *Please select a PIN authentication method:

SMS to Mobile Phone (***) *** - 6118

Voice Call to Phone (***) *** - 6118

Email Address

Click here to authenticate by using a backup code instead.

● The red dots correspond to the numbered instructional step on the left side of the screen

Request PIMS Access

Instructions

5. Click the person icon
6. Click "Request Access to CAFS Systems"

The screenshot shows the 'CAPITAL ACCESS FINANCIAL SYSTEM' dashboard. At the top right, there is a user profile icon with a red circle containing the number '5'. Below it, in the navigation menu, there is a red circle containing the number '6' next to the text 'Request Access to CAFS Systems'. The dashboard content includes sections for 'Capital Access Dashboard', 'Account at a Glance', 'Program Information' (with dates Nov 1, 2015 and Nov 22, 2015), and 'News' (with a headline about SBA's new process for measuring urban and rural lending activity). On the right side, there is a sidebar with various settings and statistics, including 'Home Page Theme', 'Breast Cancer Awareness Month', 'Financial Green Theme', 'Lighter Shade of Pale Blue Theme', 'Text-Only Black and White Theme', 'Developers-Only Debug: Show/Hide *ALL* (except icons)', 'Begin New Query Mode', 'Developers-Only Debug: Test, catweb, ca2rouge, instance2', 'Direct Grants', 'Total Loans', '504 Debentures', 'Disaster Loans', 'Loans to Microborrowers', 'Loans to Microlenders', 'SBIC Commitments', and 'Current Interest Rates'.

● The red dots correspond to the numbered instructional step on the left side of the screen

Request PIMS Access

Instructions

7. Scroll down to “Partner Information Management System (PIMS)” and click the folder icon
8. Click on the check box next to “Update your partner information (Regulated Lenders)”
If this box is already checked, you have PIMS edit access and can skip to step 14
9. Enter your organization’s Location ID
10. Click “Submit”
11. You will receive an email that your account has been updated
NOTE: THIS IS NOT AN APPROVAL FOR ACCESS
12. After your access request is approved by your organization’s Authorizing Official, and is approved by the SBA Program Office, you will receive an email from donotreply@sba.gov If you do not receive this email **within 1-3 business days**, contact cls@sba.gov or the CLS Call Center at (833) 572-0502

Capital Access Financial System

Profile Access Choose Function Change Password

- FTA Portal
- Hurricane Contracting Information Center
- Intermediary Lending Program Electronic Reporting System
- Lender Match
- Loan Associated Names and Addresses (LANA)
- MicroLoan Program Electronic Reporting System (MPERS)
- Microlender Intermediary Application System
- OCRM Lender Compliance Portal
- 7** Partner Information Management System (PIMS) (Some roles exist) [Clear Content](#)
- 8** Update your partner information (Regulated Lenders)
- 9** Location Id
[Input Field] Det: [Lookup](#) [Input Field] Det: [Lookup](#) [Input Field] Det: [Lookup](#)
[Input Field] Det: [Lookup](#) [Input Field] Det: [Lookup](#) [Input Field] Det: [Lookup](#)
- View Partner Information
- Location Id
[Input Field] Det: [Lookup](#) [Input Field] Det: [Lookup](#) [Input Field] Det: [Lookup](#)
[Input Field] Det: [Lookup](#) [Input Field] Det: [Lookup](#) [Input Field] Det: [Lookup](#)
- SBA One
- Surety Bond Guarantee Systems (SBG/PSB)

10 Submit



● The red dots correspond to the numbered instructional step on the left side of the screen



Step 2: Review and Validate PIMS Information

Ensure the FTA and SBA have the most up-to-date contact information so you never miss an important message

Instructions

14. Click "General"
15. Click "Partner Information Management System (PIMS)"

14 General

15 Partner Information Management System (PIMS)

Account at a Glance

Program Information

- Nov 1, 2015**
SBG Surety conference
Surety Policies, 9:15AM (SBA HQ, Eisenhower room A)
- Nov 1, 2015**
Free Small Business Assistance
Interested in starting a small business? Want to grow your small business? The U.S. Small Business Administration (SBA) can connect you to free small business counseling services. 9:00 am EST - 12:00 pm EST/12:01, Outer Loop, Room 129, Louisville, KY 40203.
- Nov 22, 2015**
Leadership Essentials & Coaching
This class is part of the Supervisory Leadership Series. 8:30 am CST - 4:30 pm CST/1975 University Ave, Madison, WI 53706.

News

SBA's new process for measuring urban and rural lending activity
To enhance the quality of SBA's reporting, SBA will rely on data from the US Census Bureau to determine whether the small business applicant is located in a rural or urban county. Loans with a project address in a county the US Census Bureau has defined as >=30% Rural will be treated as rural loans and <30% will be treated as urban loans.
More information about the Census Bureau's urban-rural classification and the Census Bureau's County Classification Lookup Table can be found here: <https://www.census.gov/geo/reference/urban-rural.html> and here: https://www2.census.gov/docs/reference/ua/County_Rural_Lookup.xlsx.

SBA Today

Portfolio Size & Dollars (in Billions)	\$
572,829 instruments for	180

Financial Instruments Funded FY 2021	#
PSB Bid Bonds	0
PSB Final Bonds	1
Guaranteed Bid Bonds	0
Guaranteed Final Bonds	0
Direct Grants	39
Total Loans	69
504 Debentures	50
Disaster Loans	11
Loans to Microborrowers	1
Loans to Microlenders	6
SBIC Commitments	0

Current Interest Rates	Rate
5W Constant Maturity Treasury	1.375%
504 Note Rate for 10 years	2.64746%
504 Note Rate for 20 years	2.96978%
504 Note Rate for 25 years	2.96978%
LIBOR	4.36%
SBA Fixed Base Rate	10.75%
SBA Peg Rate	1.88%
Wall Street Journal Prime Rate	4.75%

● The red dots correspond to the numbered instructional step on the left side of the screen

Instructions

16. Scroll down and review the contact information currently in the system

If the existing information is correct and complete, no further action is necessary

17. If the existing information is correct but you would like to add additional contact information, click “Edit” under “Partner Contacts” and click on the Contact Name to go to the Detailed Edit Screen of a Contact.

The screenshot displays the PIMS interface for reviewing partner information. The left sidebar contains a navigation menu with categories like Partner, Partner History, Location History, Agreements, Alias Information, Contacts, Partner Contacts, Locations, and Location Description. The main content area is titled 'Partner Information' and includes fields for Partner Name, ID, Category, Type, Charter, SBA Office, and Legal Type. Below this is a table for 'Alias Type' with columns for 'Alias Type' and 'Alias'. The 'Contact Information' section is a table with columns for 'Contact SBA Roles' and 'Partner Positions'. Two red circles and boxes highlight specific elements: circle 17 points to the 'Edit' button in the 'Partner Contacts' menu, and circle 16 points to the 'Contact Information' table.

Contact SBA Roles	Partner Positions
President Chief Executive Officer	
Commercial Loan Officer	

PLEASE NOTE: It is vital that complete and up-to-date contact information is reflected in PIMS, especially an accurate “SBA Role.” This allows the FTA to contact the correct point of contact so that you get important information about SBA Loan Programs.

● The red dots correspond to the numbered instructional step on the left side of the screen

Instructions

18. Fill in all required information, indicated by **bold text**
Phone Number must be entered with dashes (XXX-XXX-XXXX)
19. Select the applicable SBA Role from the list
If multiple roles are applicable, hold the "CTRL" or "CMD" key and click the applicable values
20. If applicable, select your Partner Position title
If none of the Partner Position options are applicable, leave it blank
21. Provide mailing address
 - a) If the Location Address that you see is the address at which you can receive mail, click "Use the existing Location Address"
 - b) If you would like to provide a different address, click "Enter a new address for this Contact" and fill in the required information.
22. Click "Save"

The screenshot shows the 'Add New Contact' form in the PIMS system. The form is divided into several sections: 'Contact information...', 'SBA Roles', 'Partner Position', and 'Address'. Red boxes and numbered callouts (18-22) highlight the following elements:

- 18:** The 'Contact information...' section, which includes fields for FIRST NAME, LAST NAME, JOB TITLE, MAIL STOP, PHONE, FAX, EMAIL, and WEB.
- 19:** The 'SBA Roles' dropdown menu, which includes options like 'SBA Delegated Authority Contact', 'Primary SBA Contact', and 'Primary Communications Contact'.
- 20:** The 'Partner Position' dropdown menu, which includes options like 'President', 'Chief Executive Officer', and 'Commercial Loan Officer'.
- 21a:** The 'Use the existing Location Address' radio button and the 'Mailing Address' field.
- 21b:** The 'Enter a new address for this Contact' section, which includes a 'Select Type of Address' dropdown, 'ADDRESS 1', 'ADDRESS 2', 'CITY', 'STATE', and 'POSTAL CODE' fields.
- 22:** The 'Save' and 'Clear' buttons at the bottom of the form.

PLEASE NOTE: It is vital that complete and up-to-date contact information is reflected in PIMS, especially an accurate "SBA Role." This allows the FTA to contact the correct point of contact so that you get important information about SBA Loan Programs.

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Delete PIMS Information

Instructions

- 23. To delete outdated contacts, click “Edit” under “Partner Contacts”
- 24. Click “Remove” on the contact you would like to delete

The screenshot displays the 'Edit Contact Information' interface. On the left, a blue sidebar contains a tree view of navigation options. Under 'Partner Contacts', the 'Edit' option is highlighted with a red box and a red circle containing the number 23. The main content area shows a form with various fields for contact information, including 'Location ID', 'Mailing Address', 'Phone', and 'Partner Positions'. A 'REMOVE' button is highlighted with a red box and a red circle containing the number 24. The page also features a top navigation bar with 'PIMS', 'Reports', and 'Documents' tabs, and a footer with the text 'Last modified: 06/28/2016 12:00:00 AM SBA Processing: 0.022 seconds'.

● The red dots correspond to the numbered instructional step on the left side of the screen

Instructions

25. Click “View” under “Partner Contacts” to view a complete list of the partner contact information provided for your organization
26. Review this information for accuracy and completeness
27. Continue to utilize the PIMS system to make updates as needed to maintain proper points of contact

The screenshot displays the PIMS system interface. The left-hand navigation menu is expanded, showing the 'Partner Contacts' section. A red box highlights the 'View' button, with a red dot and the number '25' next to it. The main content area shows the 'Contact Information' section, which includes fields for Location ID, Mailing Address, Primary Physical Address, and Mail Stop. Below this, there are sections for 'Partner Positions' and 'Contact SBA Roles'. The interface also includes a 'PIMS Menu' on the left, a 'Reports' and 'Documents' header, and a 'Date: 06-28-2021' indicator. At the bottom of the screenshot, there are two icons: a magnifying glass with a red dot and the number '26' next to it, and a warning triangle with an arrow pointing to a checkmark, with a red dot and the number '27' next to it.

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Need Help?

Topic	Point of Contact
CLS Account & PIMS Help	CLS@sba.gov (833) 572-0502
FTA Questions	FTA@sba.gov (877) 470-0722
Information & Resources	FTA Wiki