

Reminder: CAFS Accounts & PIMS Data Entry

The incoming FTA was contracted by SBA to support a migration of 7(a) program systems and applications into SBA's Capital Access Financial System (CAFS), and the migration of systems is projected to be complete by **Monday, August 30, 2021**.

The FTA has requested that all users to set up a CAFS Account and update contact information to the Partner Information Management System (PIMS). This is a reminder to take the following actions:

1. **Establish a CAFS Account:** A CAFS Account is required for each individual in your organization in order to access the applications and data required to do business with the SBA. Each organization will have a unique identifier called a Location ID. All CAFS Accounts must be associated with a Location ID. For instructions on how to establish a CAFS account, please use the [CAFS Account Set Up Guide](#).
2. **Add or Update Contact Information to the Partner Information Management System (PIMS) within CAFS:** Moving forward, PIMS will be the SBA's master database for capture, maintenance, and use of contact information for ALL participants of the 7(a) loan program including Lenders, Lender Service Providers (LSPs), Pool Assemblers, Brokers / Dealers, and Investors. Colson's 1502 Connection and 1502 Dashboard will be retired at cut-over and the associated contact lists within those applications will not be maintained. For instructions on how to access and add your information to PIMS, please reference the [PIMS Instructional Guide](#).

For Secondary Market Participants including Investors:

We understand that historically, SBA has not required you to have a CAFS account or a PIMS entry to do business with the SBA, and therefore the process for you is slightly different.

- Secondary Market Institutions (Broker Dealers, Originators, Pool Assemblers, and Investors) have been automatically added to PIMS and **assigned a unique Location ID**.
- **The first person within your institution to create a CAFS Account using your institution's Location ID will automatically be designated as an Authorizing Official (AO).** The role of the AO is to approve additional CAFS accounts and system requests aligned to your institution's Location ID. To change or add to your institution's AO list, please email Customer Login Service (CLS) at CLS@sba.gov. *Note: Whoever is designated as an additional AO must have an active CAFS account.*

Below are instructional resources to help you complete this request and ensure SBA can provide you and your organization timely news and updates through the transition and beyond.

- [Establishing or updating a CAFS Account](#)
- [Accessing and Updating PIMS](#)
- [General News and Information on the FTA](#)

Thank you for your cooperation. Should you have any questions, please contact the FTA Customer Service at FTA@SBA.gov.