SBA 7(a) Vendor Onboarding Process for APIs

Effective August 30, 2021, Fiscal Transfer Agent (FTA) functions for the U.S. SBA implementation of the CARES Act for the 7(a) loan program will transition from Colson Services to Guidehouse. As part of the transition, 7(a) applications are being migrated to SBA's Capital Access Financial System (CAFS).

With this systems migration, SBA is also introducing new 7(a) program APIs, including APIs for LoanList and 1502 Report Submission within the FTA Portal.

Benefits of using APIs during 7(a) loan process:

- Reduce manual effort to enter data
- Streamline 1502 reporting and secondary market loan data collection for authorized users
- Handle increased volumes of data more efficiently
- Heighten lender satisfaction in engagement with SBA loan programs

Alongside the introduction of these new 7(a) APIs, SBA is releasing updated guidance for the vendor onboarding and API integration process. Please find below a **step-by-step process summary** to set up an API with SBA for 7(a) loans.

1. **Complete ISA Form:** The ISA Form can be found on the Wiki using **this link** and should be filled out and signed by the vendor.
2. **Submit ISA Form:** Vendors should submit their completed ISA Form to Ronald Whalen (Ronald.Whalen@SBA.gov) at SBA's Office of Performance Systems Management (OPSM) as well as Timalyn Franklin (Timalyn.Franklin@SBA.gov).
3. **Receive Software Vendor IDs:** The completed ISA is reviewed and signed by the system owner, and the signed ISA is uploaded to SBA's Partner Information Management System (PIMS) for record. After the ISA is uploaded, vendors will receive Partner ID, Location ID, Vendor Software Name and Vendor Software ID.
4. **Access Vendor Testing Platform:** Following the ISA process, SBA will send the vendor a welcome package including an integration guide, at which time the vendor can self-register for test vendor CAFS account(s) in CATWEB2, obtain access via role request and assignment, and set up 2-factor authentication.
5. **Complete Required Testing in Vendor Testing Platform:** The vendor will complete required testing on the CAFS Vendor Test Environment (catweb2.sba.gov) under SBA supervision.
6. **Access Production API:** After testing is complete and upon SBA approval, a PIN will be generated and allow the vendor to gain access to the API in the CAFS Production Environment. API users will also need individual CAFS user credentials, which must be approved by the Authorizing Official and the Program Office; please leverage the roles, permissions, and Location ID of the financial institution being supported.

For additional information on this topic, please review this API Process Map from the FTA Wiki. Please direct any questions to FTA@SBA.gov.