



FAQs

U.S. Small Business Administration Fiscal Transfer Agent Migration

Background: To improve security and integration of 7(a) loan program information for the U.S Small Business Administration (SBA) and promote greater standardization, controls, and reduce redundancies, all Fiscal Transfer Agent (FTA) applications and 7(a) program data have been migrated to SBA’s Capital Access Financial System (CAFS). The SBA selected Guidehouse to serve as the new Fiscal Transfer Agent for the 7(a) loan program and secondary market.

Question	Answer
1. Who is Guidehouse?	<p><i>Guidehouse is now the U.S. Small Business Administration’s Fiscal Transfer Agent for the 7(a) Loan Program. Guidehouse is a global consultancy of over 10,000 professionals serving public sector and commercial clients in the financial services, energy, health care and defense/intelligence markets. Guidehouse has served as the SBA’s Central Servicing Agent (CSA) for the 504 Loan Program since 2012, with banking partner Wells Fargo.</i></p> <p><i>We have transitioned the various applications and systems from Colson Services Corp. to SBA’s Capital Access Financial System (CAFS). Throughout the migration, we have implemented some changes to existing applications to improve the process and experience for the lending community, as well as the SBA.</i></p>
2. When is the FTA changing?	<p><i>Guidehouse has fully assumed all FTA responsibilities on August 30th, 2021.</i></p>
3. Who will be affected by the changes?	<p><i>The change is applicable to all lenders & LSPs who participate in the SBA’s 7(a) loan program in order to collect payment and loan information, as well as investors, broker dealers, and pool assemblers who participate in the 7(a) loan program’s secondary market.</i></p>
4. Will there be significant changes to my user experience?	<p><i>This migration is a lift and shift for the lending and secondary market applications, which are all available in SBA’s Capital Access Financial System (CAFS). That means that the applications still look and operate as you are used to. All data has been migrated over and is available to you.</i></p>



5. How do I ensure I receive FTA communications?	<i>To receive general announcements and program information: click here To receive announcements related to the Secondary Market: click here You can also visit the FTA Wiki here</i>
6. How will I access the FTA applications?	<i>You will need an active CAFS account. Instructions to create a CAFS account can be found here.</i>
7. Will my current Colson account be setup automatically for me in CAFS?	<i>No. Please follow the instructions to create a CAFS account found here.</i>
8. Why am I unable to see user roles or I have only limited access to CAFS?	<i>Please ensure you have completed two-factor authentication at sign in. Failure to do so will result in a limited view of CAFS features, including user roles.</i>
9. How will CAFS users update contact information in the database?	<i>Users will make updates to their contact information in the CAFS Partner Information Management System (PIMS). Please use the instructions found here.</i>
10. What role should I request in the FTA Portal?	<i>All 7(a) participants should request the 'partner' role in CAFS. In the FTA Portal, please click here for details on what role you should request.</i>
11. Who do I contact if I have questions about my CAFS account?	<i>Please contact SBA CLS Customer Service team at CLS@sba.gov or (833) 572-0502.</i>
12. Will there be any trainings or informational sessions?	<i>The FTA has coordinated informational sessions such as the Secondary Market Office Hours for the Industry and will continue to hold such sessions. Please continue to actively monitor the FTA wiki (sba.gov) site and subscribe to email updates (see question 5) for information.</i>
13. Are PPP loans included under the 7a Program umbrella?	<i>Yes, these loan payments are still included within the 7(a) program. PPP loan reporting and Section 1112 debt relief payment requests will be handled within the CARES Act Module of the 1502 Gateway.</i>
14. Who do I contact if my question is not answered here?	<i>FTA Customer Service Representatives can provide answers and general guidance on the 7(a) loan program via email at FTA@SBA.gov.</i>