U.S. Small Business Administration

Partner Information Management System (PIMS)

Access and Update Guide

Overview

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.

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Step 1: Request Access to PIMS

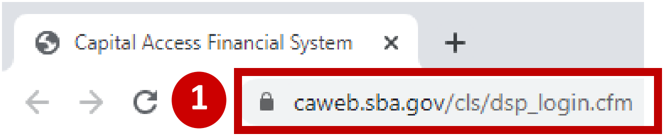
Authenticate your Account

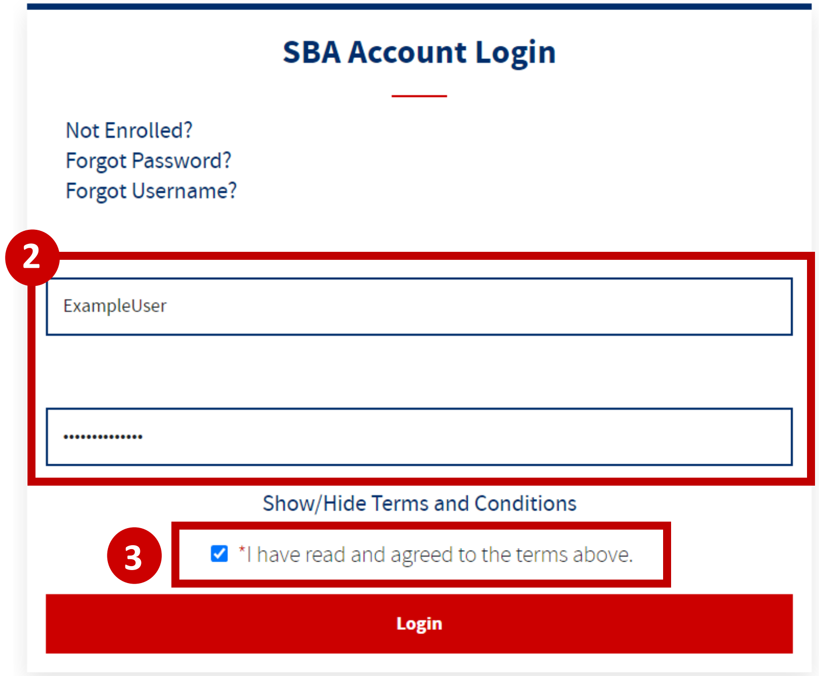
Instructions

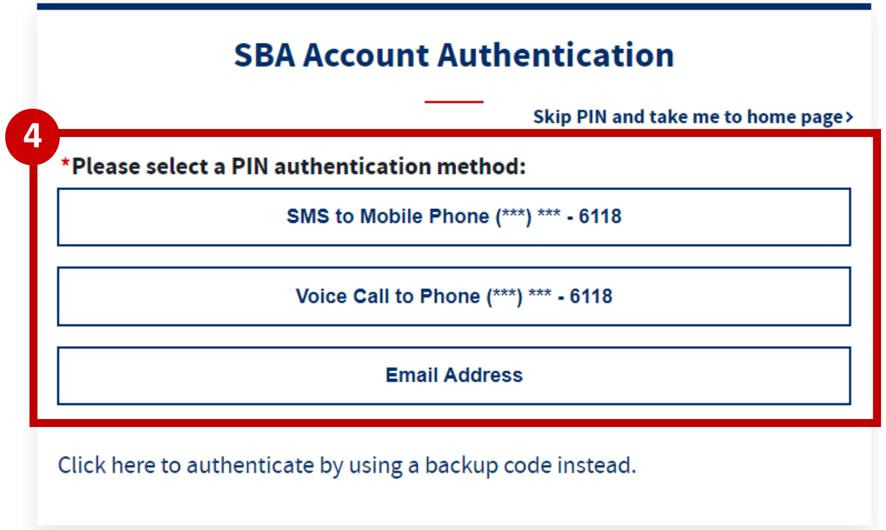
1. Go to the **Capital Access Financial System (CAFS)** home page: https://caweb.sba.gov/
2. Enter your User ID and Password to log in to your CAFS Account

   If you do not yet have a CAFS Account, instructions on set up can be found on the [FTA Wiki](#)
3. Check the box next to **"I agree to these terms"** and click **"Login"**
4. 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







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Request PIMS Access

Instructions

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

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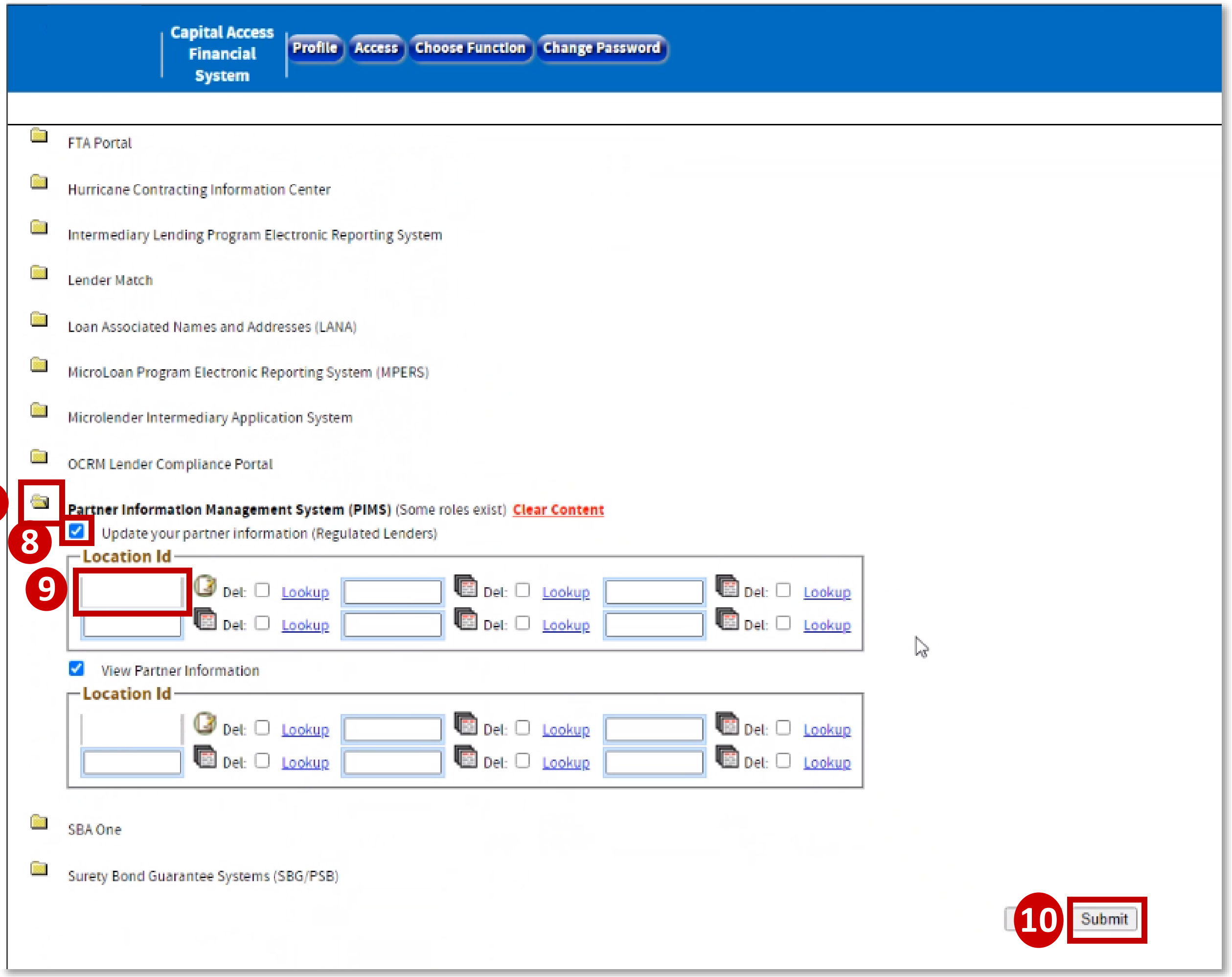
Request PIMS Access

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



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cls@sba.gov

(833) 572-0502

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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

Review PIMS Information

Overview | Access | Update

Instructions

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

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

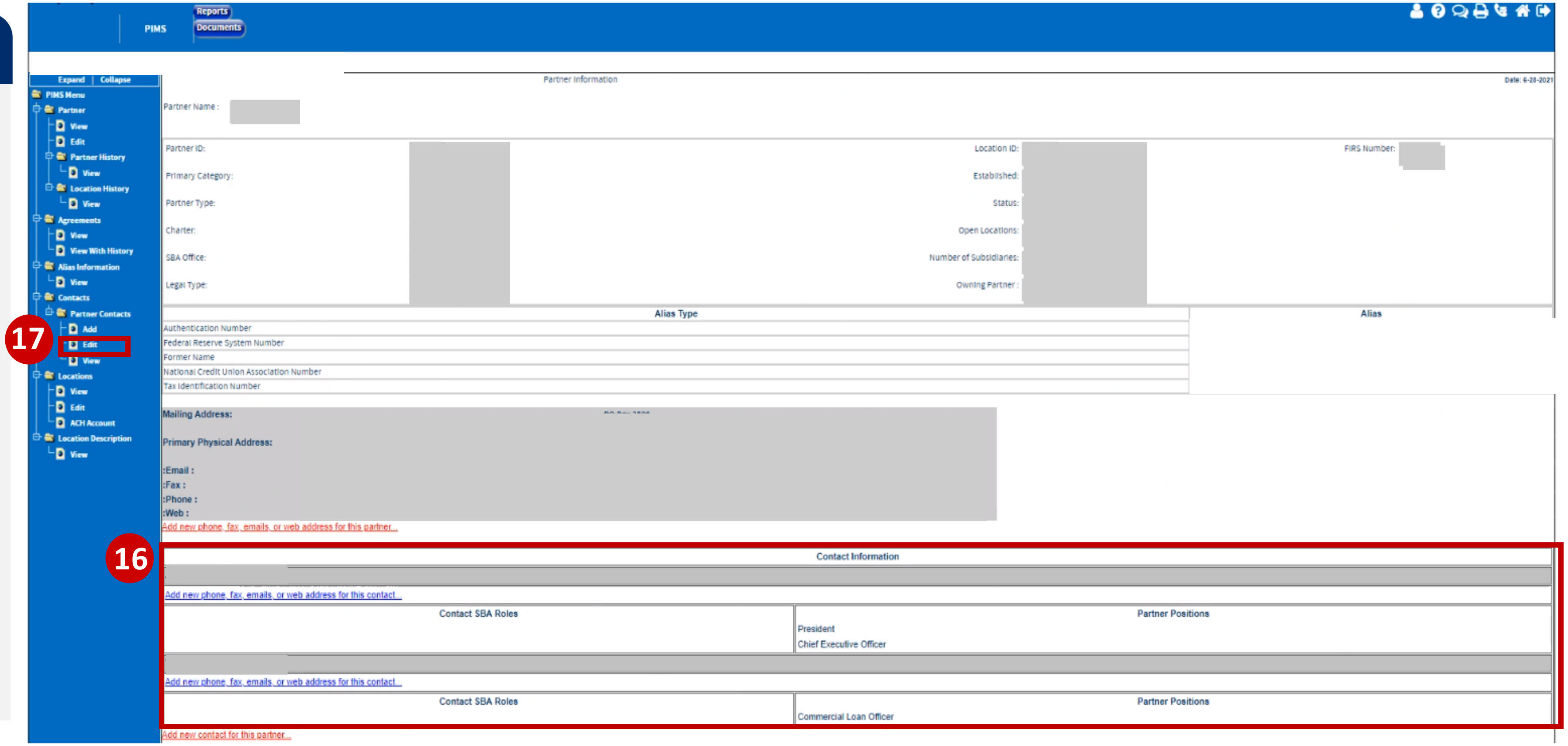
Review PIMS Information

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.



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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Add New PIMS Information

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 "CRTL" or "CMD" key and click the applicable values

20. If applicable, select your Partner Position title

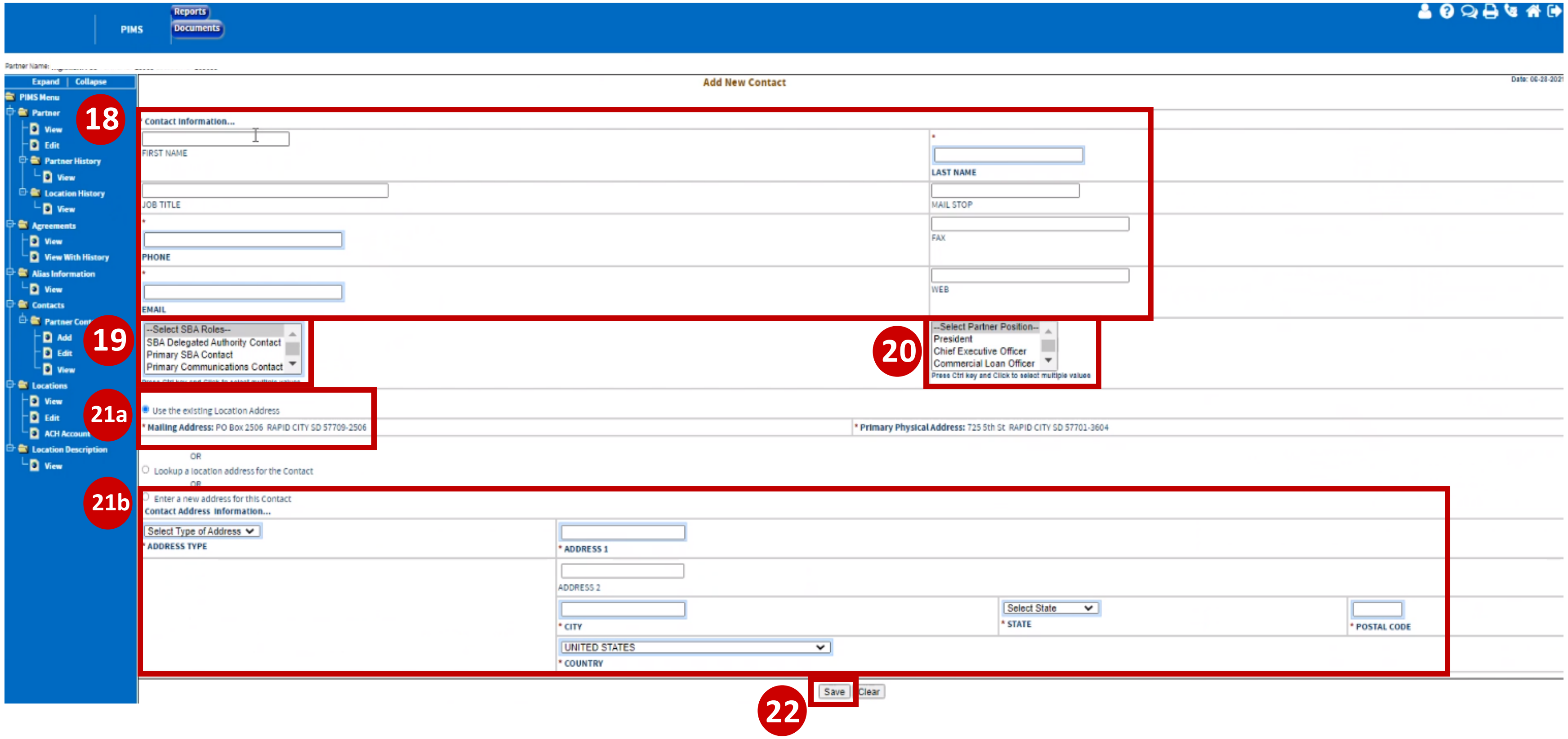
    If none of the Partner Position options are applicable, leave it blank

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"



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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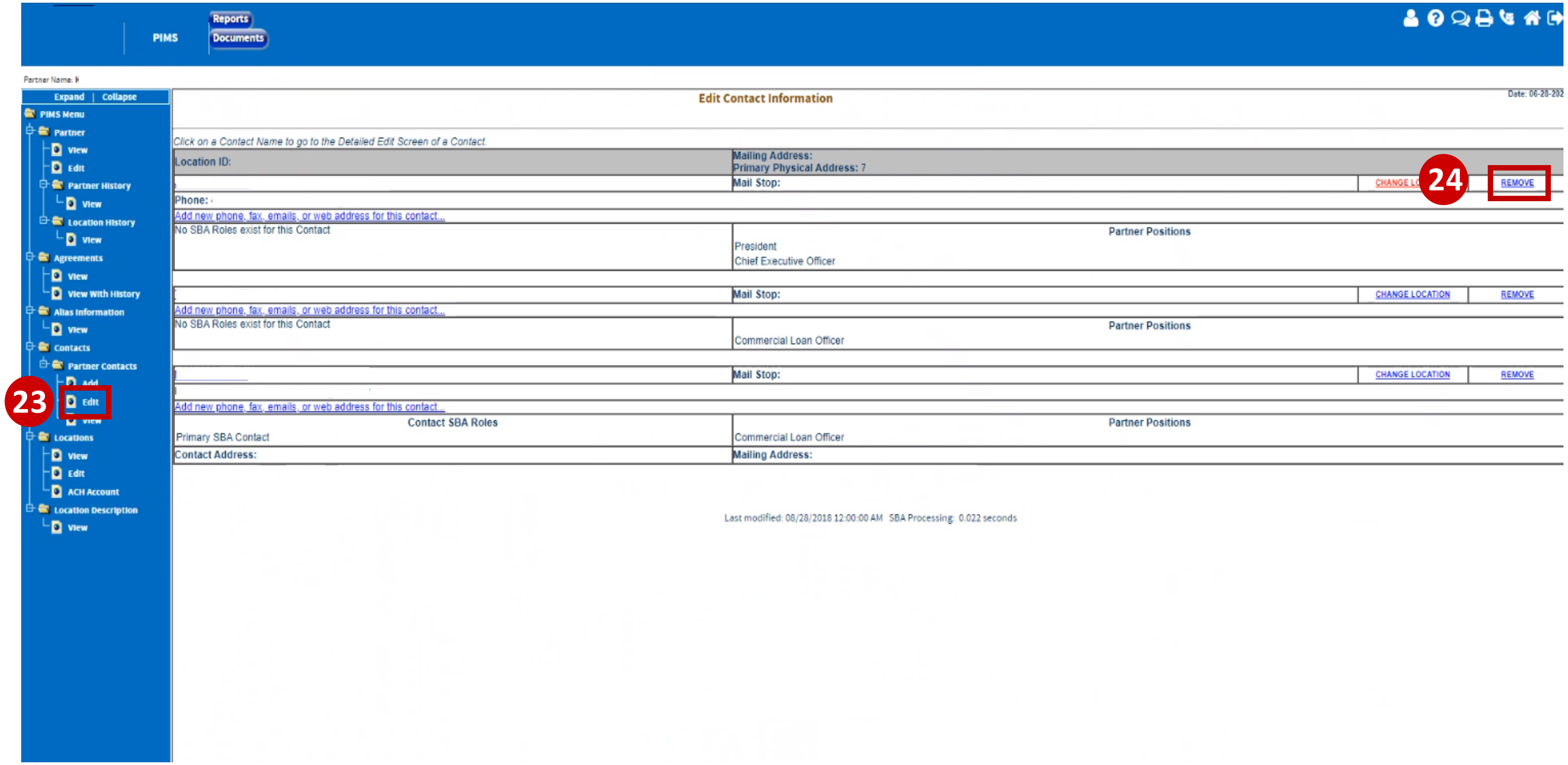
Delete PIMS Information

Instructions

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



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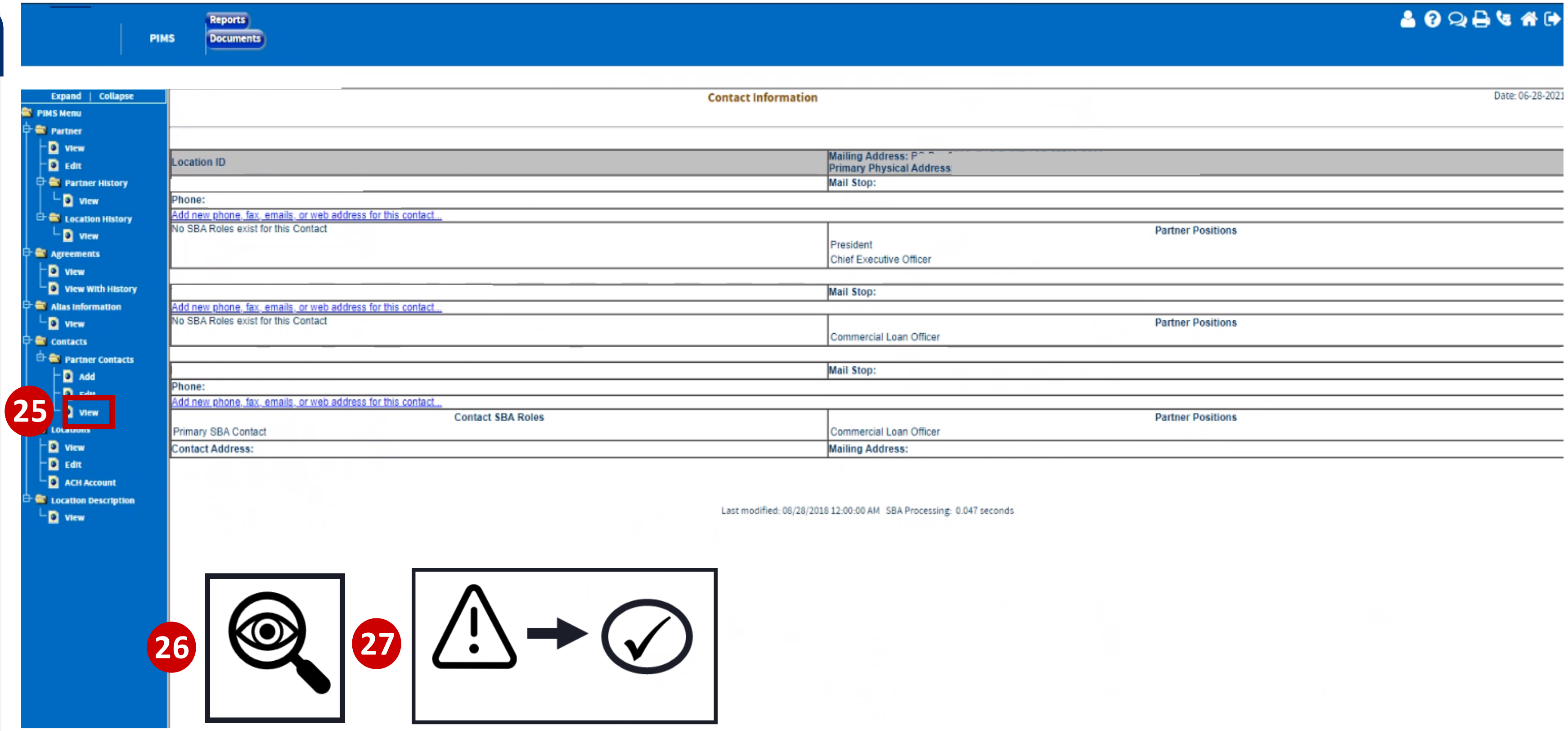
Review PIMS Information

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



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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