

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 | Capital Access Financial System × + ← → C 1 caweb.sba.gov/cls/dsp_login.cfm | SBA Account Authentication Skip PIN and take me to home page> |
| Financial System (CAFS) home page: <u>https://caweb.sba.gov/</u> | | *Please select a PIN authentication method: SMS to Mobile Phone (***) *** - 6118 |
| Enter your User ID and Password to log in to your CAFS Account | SBA Account Login | Voice Call to Phone (***) *** - 6118 |
| If you do not yet have a CAFS Account, instructions on set up can be found on the <u>FTA Wiki</u> | Not Enrolled? Forgot Password? Forgot Username? | Email Address Click here to authenticate by using a backup code instead. |
| Check the box next to "I agree to these terms" and click "Login" | 2 ExampleUser | |
| You will be asked to authenticate using a PIN | Show/Hide Terms and Conditions | |
| 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 | 3 | |

1.

2.

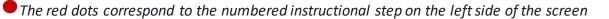
3.

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Request PIMS Access





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Request PIMS Access

Instructions

- 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 <u>donotreply@sba.gov</u> 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 | |
|----------|---|-------------------|
| _ | | |
| | 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 | |
| a | Partner Information Management System (PIMS) (Some roles exist) Clear Content | |
| 8 | Partner Information Management System (PIMS) (Some roles exist) <u>Clear Content</u> Update your partner information (Regulated Lenders) Cocation Id | |
| 9 | Image: | 13 cls@sba.gov |
| | View Partner Information | |
| | Location Id Det: Lookup Det: Lookup | (833) 572-0502 |
| | 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

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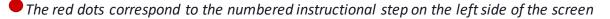


Step 2: Review and Validate PIMS Information

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

Review PIMS Information





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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.

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|----------------|--|-----------------------------|-------------------------|------------|---------------|--|
| Collapse | | Partner Information | | | Date: 6-28-21 | |
| | 1 | | | | | |
| | Partner Name : | | | | | |
| | | | | | | |
| | | | | | | |
| History | Partner ID: | | Location ID: | | FIRS Number: | |
| u | | | | | | |
| n History | Primary Category: | | Established: | | | |
| n mislory r | Partner Type: | | Status: | | | |
| | Participation of the second seco | | States. | | | |
| 5 | Charter: | | Open Locations: | | | |
| | | | | | | |
| ith History | SBA Office: | | Number of Subsidiaries: | | | |
| nation | | | | | | |
| | Legal Type: | | Owning Partner : | | | |
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| Contacts | Laboration to show here | Alias Typ | De | | Alias | |
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| | | ner Name | | | | |
| | Tax identification Number | It Union Association Number | | | | |
| | | | | | | |
| | Mailing Address: | NN No. 1808 | | | | |
| count | | | | | | |
| escription | Primary Physical Address: | | | | | |
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| | :Phone : | | | | | |
| | :Web : | | | | | |
| | Add new phone, fax, emails, or web address for this partner | | | | | |
| 16 | | | Contact Information | | | |
| 16 | | | Contact mormation | | | |
| | | | | | | |
| | Add new phone, fax, emails, or web address for this contact | | | | | |
| | | Contact SBA Roles | | Partner Po | sitions | |
| | | | President | | | |
| | | | Chief Executive Officer | | | |
| | | | | | | |
| | | | | | | |
| | Add new phone, fax, emails, or web address for this contact | | | | | |
| | | Contact SBA Roles | | Partner Po | sitions | |
| | | | Commercial Loan Officer | | | |
| | Add new contact for this partner | | | | | |

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.



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.
- Reports 👗 🕄 📿 🖨 🔄 👘 🖬 PIMS Date: 00.28.20 Expand Add New Contact Parts 18 Contact Information.. 🕘 Vies 🕘 Edit 🖻 🚘 Partner LAST NAME 🗆 💽 View 🗧 Location His OB TITLE 🛛 🗿 View Agre 🕘 View View With History Alias Info L 💽 View Contact 🗟 🥽 Par Select SBA Roles Select Partner F 19 • 💽 🗠 BA Delegated Authority Contact esident 🗿 Edit hief Executive Officer imary SBA Contact nmercial Loan Officer rimary Communications Contact 🕘 View a Otri key and Olick to aslant o - O View - O Edit 21a e existing Location Address Address: PO Box 2506 RAPID CITY SD 57709-25 * Primary Physical Address: 725 5th St. RAPID CITY SD 57701-360 a CH Ac 🚔 Loca 🕘 View ookup a location address for the Conta Enter a new address for this Contac ntact Address Information... elect Type of Address 🗸 DDRESS TYPE ADDRESS 1 ADDRESS 2 Select State ~ * STATE POSTAL CODE UNITED STATES ~ COUNTRY 22

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.

22. Click "Save"

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

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

| Nome: H Expand Collapse | Edit Contact Information | C |
|--|---|--------------------|
| MS Menu | | |
| Partner Click on a Contact Name to go to the Detailed Edit Screen of a Contact. | | |
| Edit Location ID: | Mailing Address: Primary Physical Address: 7 | |
| Partner History | Mail Stop: | |
| Phone: | | |
| Add new phone, fax, emails, or web address for this contact | | |
| No SBA Roles exist for this Contact | Partner Positions | |
| Agreements | President Chief Executive Officer | |
| View | | |
| View With History | Mail Stop: | CHANGE LOCATION RE |
| Atas Information Add new phone, fax, emails, or web address for this contact No SBA Roles exist for this Contact | | |
| No SBA Roles exist for this Contact | Partner Positions | |
| Contacts | Commercial Loan Officer | |
| The Partner Contacts | | |
| -D add | Mail Stop: | CHANGE LOCATION R |
| Edit | | |
| Add new phone, fax, emails, or web address for this contact | Partner Positions | |
| Locations Primary SBA Contact | Commercial Loan Officer | |
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| D Edit | | |
| ACH Account | | |
| Location Description | | |
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Review PIMS Information

Reports Documents

PIMS

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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

| Contact Information Date: 06 | | | | | | |
|------------------------------|---|---------|--------------------------------------|--|-------------------|--|
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| | | | | | | |
| Location ID | | | Mailing Addres Primary Physic | Mailing Address: PCCCC Primary Physical Address | | |
| | | | Mail Stop: | | | |
| Phone: | | | | | | |
| Add new phone, fa | emails, or web address for this contact | | | | | |
| No SBA Roles exis | ir this Contact | | President Chief Executive | Dfficer | Partner Positions | |
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| | emails, or web address for this contact | | | | | |
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| Phone: | | | | | | |
| Add new phone, fa | emails, or web address for this contact | | | | | |
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| Primary SBA Cont | | | | | | |
| ontact Address: | | | Mailing Addres | : | | |
| | | | | | | |
| | | | | | | |
| | | | | Deserve a cost a | | |
| | | Lastr | modified: 08/28/2018 12:00:00 AM SB/ | Processing: 0.047 seconds | | |





Need Help?

| Торіс | Point of Contact | |
|----------------------------|--------------------------------------|--|
| CLS Account & PIMS Help | <u>CLS@sba.gov</u> (833) 572-0502 | |
| FTA Questions | <u>FTA@sba.gov</u> (877) 470-0722 | |
| Information & Resources | <u>FTA Wiki</u> | |

