

FAQs 1

Question	Response
How are lenders directed to the new CLS site – automatically routed from GLS?	Lenders are not redirected to CLS. Lenders should log in at https://caweb.sba.gov/cls/dsp_login.cfm
Is there any purpose to using GLS anymore?	GLS is still used by the agency for non-OCA systems. For assistance with GLS contact itsc@sba.gov .
PIMS is located under both GLS and CLS – where should we be updating information in PIMS?	There are now two PIMS systems—Enterprise PIMS (managed by OCIO) and OCA PIMS (managed by OCA OPSM). <ul style="list-style-type: none">• Enterprise PIMS is managed by OCIO and supports OCIO applications like SBIC.• OCA PIMS contains the agreements for being able to originate and service SBA loans.• OCA PIMS is updated by Acuity.• Changes in Enterprise PIMS will not be migrated to OCA PIMS and vice versa.
Are there any guidelines as to who at the lending institutions should be authorizing officials?	The authorizing official(s) is responsible for approving and validating lender accounts to address cybersecurity risks. The authorizing official should be someone who frequently reviews email requests and approves/rejects requests in 48 hours. The authorizing official is also responsible for recertifying the accounts bi-annually.
Do users have to know who at their institution is the authorizing official?	Users should know who is the authorizing official for their bank.
What happens if an approving official doesn't approve in 48 hours?	The request is deleted.

FAQs 2

Question	Response
Is it possible for users to do a lookup of AO by institution?	No, lenders cannot lookup the authorizing official by institution.
How do non-SBA employee users complete the supervisor fields?	Enter the e-mail address or first and last name of the authorizing official and click the lookup button.
How do users update their profiles to indicate they want to be a LINC contact?	Identify the email address or name of the organization's authorizing official. <ol style="list-style-type: none">1. Update your user profile at https://caweb.sba.gov/cls/dsp_login.cfm.2. Select "LINC Contact" for job classification3. Enter the authorizing official4. Enter service areas5. Go to "Access" and request "Lender Opt In" and enter the location ids.
How do users update their profiles to indicate they want to be an authorizing official?	<ol style="list-style-type: none">1. Log in to the user profile at https://caweb.sba.gov/cls/dsp_login.cfm.2. Select "Authorizing Official" for title<ul style="list-style-type: none">• If you are the first authorizing official for a location id, submit the request and send an email to CLS@SBA.gov with subject "Authorizing Official Approval Request".• If there is/are authorizing official(s) associated with the location id in your profile, select an authorizing official from the drop down menu and complete the user profile.

FAQs 3

Question	Response
Does an authorizing official approve users who request the LINC contact role? ETRAN? Lender Opt in? And periodically certify that the users are still employed by the organization?	An authorizing official must approve all lender accounts and access requests including LINC contact, ETRAN, and Lender Opt In.
How do individuals identify themselves as both an Authorizing Official and a LINC Contact?	The user profile page is being updated to support a user being an authorizing official and LINC Contact.
Where should questions be routed? What's the difference between cls@sba.gov and cafs@sba.gov ?	<ul style="list-style-type: none"> • CLS@sba.gov addresses access and login questions. • LINC@sba.gov addresses LINC system issues. • CAFS@sba.gov addresses systems issues related to CLCS (Centralized Chron System), Electronic Lending System (ELIPS), Electronic Transaction (ETRAN) Origination, ETRAN Servicing, ETRAN Post Servicing (PSA), GPTS, ILPERs (Intermediary Lender Program Electronic Reporting System), LANA, LAORS (Loan Accounting Report Systems), LINC Lender Opt In, MPERS (Microloan Program Electronic Reporting Systems), Micro Lender Application System, Partner Information System (PIMS), Surety Bond Guaranty, & Wizards/Loan Authorization.
LINC Changes	<ul style="list-style-type: none"> • LINC accounts set up in PIMS before 5/21 were migrated to CLS. • LINC information is no longer in PIMS. Service area information is in the User Profile. • SBA personnel cannot sign up LINC users. Each user must create an account that is approved their organization's authorizing official. The change was implemented to address cybersecurity requirements.

Requirements for Creating New Accounts

	SBA Employee	SBA Contractor	Partner (Lender)
Email Address	SBA Email Address	SBA Email Address	Valid Email Address
Approving Official Must Be In Profile	Supervisor	Contracting Office Representative	Approving Official
Supported Browser	<ul style="list-style-type: none"> • Safari • IE • Chrome 	<ul style="list-style-type: none"> • Safari • IE • Chrome 	<ul style="list-style-type: none"> • Safari • IE • Chrome

Login Information

- User ID: [SBA User Id Rules](#)
- Password: [SBA Password Rules](#)
- Re-enter Password:

Identity Information

- Name: (First) (Middle) (Last) (Suffix - Jr, Sr, I, II, etc)
- Date of Birth:
- PIN: (Personal Identification Number, Last 4 Digits of SSN)

Contact Information

- Country:
- Zip+4:
- Street 1:
- Street 2:
- City:
- Phone Number: (Country) (Area Code) (Phone Number) (Extension) (US is 1) (999-9999)
- E-Mail Address:
- Re-enter E-Mail:

User Information

- User Type:
- Customer Location:
- Job Classification: Authorizing Official LINC Contact

Supervisor Information

- Supervisor's Email:
- OR
- Supervisor's First Name:
- Supervisor's Last Name:
- Choose Supervisor:

Security

- Please enter text shown in the image (case sensitive):

Check the Authorizing official job classification if you are the authorizing official for your bank. If you are the first authorizing official designated at your bank, leave the supervisor email blank and email cls@sba.gov to have the role granted.

Enter the email address of the authorizing official at the bank. The authorizing official must have a CLS account and the Authorizing role.

If you want to receive LINC Contact email, check the LINC Contact job classification. You will need to update your profile once your email address and account have been verified

Create New SBA CLS Account (Partner)

Use this screen to create a new account for partners.

From: CLS@sba.gov [mailto:CLS@sba.gov]
Sent: Tuesday, June 16, 2015 11:38 AM
To: Jane Doe
Subject: PRODUCTION - New account request verification

Dear Jane Doe,

Your account had been created in the SBA's Capital Access Login System (CLS) at <https://caweb.sba.gov/cls> .

Please click on the link below to verify your e-mail address. This link will expire on June 16, 2015 01:38 PM.

[Verify Your Email](#)

For additional help please contact your Program Office representative at the U.S. Small Business Administration.

Please don't reply directly to this automatically-generated e-mail message.

E-mail Address Verification

E-mail will be sent to the email address that was entered on the registration page. If the email address is not verified within 2 hours, the account will be deleted and the user will need to register again.

Checking the Link Contact job classification will allow you sign up for LINC e-mails. Unchecking the box will remove you from receiving any LINC Contact email

Identity Information

* Name:
* (First) (Middle) * (Last) (Suffix - Jr, Sr, I, II, etc)

SBA Partner Information

* UserType:

Location: Authorizing Official
 LINC Contact

SBA Lender Information

Lender Authorizing Official's Email:

OR

LAO's First Name:

Lender Authorizing Official's Last Name:

Choose LAO:

Supervisor Id	First	Middle	Last	E-Mail
SheriLender	Sheri		Lender	sheri.mcconville@gmail.com

Enter the email address of the authorizing official to change the authorizing official

Contact Information

* Country:

* Zip+4:

Street 1:

Street 2:

* City/State:

* Phone Number:
* (Country) * (Area Code) * (Phone Number) (Extension)
(US is 1) (999-9999)

* E-Mail Address:

* Re-enter E-Mail:

Changing your e-mail address will require that your e-mail address be verified. Your account will be suspended until the e-mail address is verified

Profile Update

The profile button at the top of the page will allow you to update your existing profile

Information Currently Associated with Profile

Default Location Id: 9551

Now is a good time to enter the Areas of Interest for the LINC Program

Date: 06-16-2015

Highlight the State
you want to add

Areas of Interest for LINC Program		
State	Counties	Selected Counties:
Alabama	67	
Alaska	29	
American Atlantic	0	
American Europe	1	
American Pacific	0	
American Samoa	1	
Arizona	15	
Arkansas	75	
California	58	
Colorado	64	
Connecticut	8	

Selected:

Selecting a State will popup a window with all the Counties in that State.
You can use the **Select All** button to check all Counties. Or select individual Counties.
The **Done** button will return you to the list of states
When you have added all the States and Counties you need. Press the **Save Changes** button.
When the system has finished processing the items an Alert will tell you that the page can be safely closed.

Add Link Areas Of Interest

The profile update page allows you to choose your LINC areas of interest, once you check the LINC Contact job classification

Currently Associated with Profile

Default Location Id: 9551

Now is a good time to enter the Areas of Interest for the LINC Program

Date:06-16-2015

State	Counties	Selected Counties:
Arizona	15	
Arkansas		
California		
Colorado		
Connecticut		
Delaware		
Dist. of Columbia		
Florida		
Georgia		
Guam		
Hawaii		

Code	County Name	Selected?
001	APACHE	<input type="checkbox"/>
003	COCHISE	<input checked="" type="checkbox"/>
005	COCONINO	<input type="checkbox"/>
007	GILA	<input checked="" type="checkbox"/>
009	GRAHAM	<input type="checkbox"/>
011	GRFFNI FF	<input type="checkbox"/>

Selecting a State will popup a window with all the Counties in that State.
You can use the **Select All** button to check all Counties. Or select individual Counties.
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LINC Counties

Select the LINC counties