

SBA ONE

TRAINING INFORMATION

Upcoming SBA One Training Dates

(Please note: each training lasts approximately 90 minutes)

Name	DATE/TIME	LINK	DIAL INFORMATION
SBA One Overview Session	4/13 at 2 PM ET	http://ems7.intellor.com/login/711553	1-877-369-5243 or 1-617-668-3633 using 0322947#
Tips & Tricks: Loan Origination	4/18 at 10 AM ET	http://ems7.intellor.com/login/711553	1-877-369-5243 or 1-617-668-3633 using 0322947#
Step by Step: How to input a 7a Loan into SBA One – Part 1: Loan Origination	4/24 at 2 PM ET	http://ems7.intellor.com/login/711554	1-877-369-5243 or 1-617-668-3633 using 0140971#
Step by Step: How to input a 7a Loan into SBA One – Part 2: Document Management	4/26 at 2 PM ET	http://ems7.intellor.com/login/711557	1-877-369-5243 or 1-617-668-3633 using 0901053#

Training Descriptions:

- **SBA One Training : Overview session** – This training will provide a high level overview of the features and functionality for SBA One such as My Workspace, Creating a New Loan, Document Management and E-signature. This is a great session for a Lender who is new to SBA One. Presenter: Genevieve Sansom, VP Relationship Manager at BNY Mellon
- **Tips & Tricks: Loan Origination** – This session will provide a deeper dive into the Loan Origination process by addressing key points for entering different types of loans into SBA One as well as insight into the methodology, logic and workarounds. Presenter: Genevieve Sansom, VP Relationship Manager at BNY Mellon
- **Step by Step: How to Input a 7a Loan into SBA One** – This session will demonstrate how to input a loan into SBA One for the 7a program and address different scenarios for parts of the application. This session will be presented in two parts: the first focusing on inputting a loan into SBA One and the second to highlight the features of Document Management as well as to address any outstanding questions. Presenter: Genevieve Sansom, VP Relationship Manager at BNY Mellon