

# 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	3/8 at 2 PM ET	<a href="http://ems7.intellor.com/login/710629">http://ems7.intellor.com/login/710629</a>	1-877-369-5243 or 1-617-668-3633 using 0346664#
Tips & Tricks: Loan Origination	3/15 at 2 PM ET	<a href="http://ems7.intellor.com/login/710630">http://ems7.intellor.com/login/710630</a>	1-877-369-5243 or 1-617-668-3633 using 0770025#
SBA One Document Management	3/22 at 10 AM ET	<a href="http://ems7.intellor.com/login/710628">http://ems7.intellor.com/login/710628</a>	1-877-369-5243 or 1-617-668-3633 using 0861081#

### 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
- **Tips & Tricks: Document Management**- This session will provide an in depth look into the features of Document Management. Presenter: Genevieve Sansom, VP Relationship Manager at BNY Mellon