



Leveraging Information & Networks to access Capital : LINC

Office of Performance and Systems Management
National Association of Government Guaranteed Lenders (NAGGL) Meeting
"Updated by the Michigan District Office, May 21, 2015"

General Login System (GLS) Point of Access

General Login System: <https://eweb.sba.gov>

Skip Navigation Accessibility Options

SBA General Login System Ready

Welcome To SBA

*******Warning*******

- You are accessing a U S Government information system, which includes (1) this computer, (2) this computer network, (3) all computers connected to this network, and (4) all devices and storage media attached to this network or to a computer on this network. This information system is provided for U.S. Government-authorized use only.
- Unauthorized or improper use of this system may result in disciplinary action, as well as civil and criminal penalties.
- By using this information system, you understand and consent to the following:
 - You have no reasonable expectation of privacy regarding any communications or data transiting or stored on this information system. At any time, the government may for any lawful government purpose monitor, intercept, search and seize any communication or data transiting or stored on this information system.
 - Any communications or data transiting or stored on this information system may be disclosed or used for any lawful government purpose.
 - Your consent is final and irrevocable. You may not rely on any statements or informal policies purporting to provide you with any expectation of privacy regarding communications on this system, whether oral or written, by your supervisor or any other official, except SBA's Chief Information Officer.

Cancel I Agree

After you've selected "I Agree" you are directed to the login page →

SBA Account Login

User ID

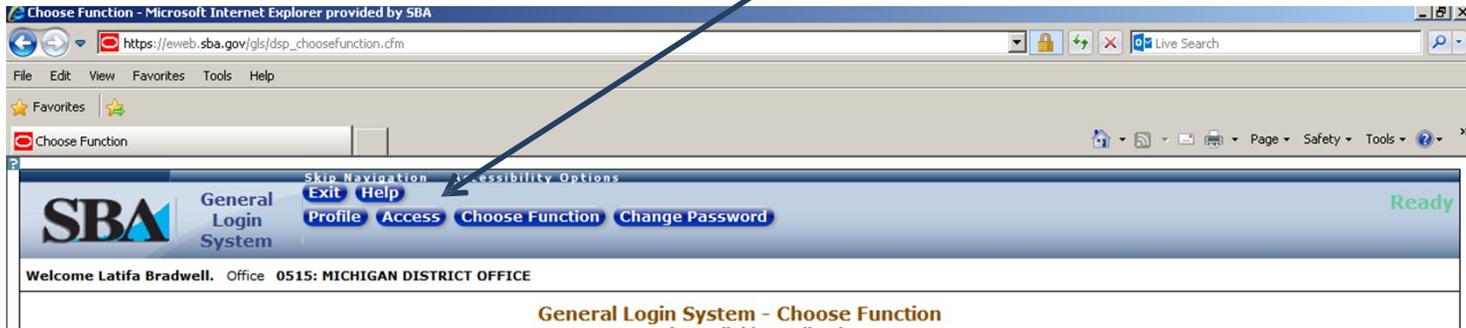
Password

Login Clear

[Text Only](#)

GLS - Request Access to PIMS & Lender Opt In

Request GLS access to PIMS



GLS – Update PIMS & LINC - Lender Opt In

Leveraging Information and Networks to Access Capital (LINC)
 Lender Opt In ([Show/Hide](#))

Location Id

9551 Del: [Lookup](#)

Note: Lender Opt In is currently unavailable. Will be made available in the coming weeks. The Lender Opt In feature is not required to receive and respond to LINC referrals.

Partner Information Management System (PIMS)

Update your partner information (CDC Partners). ([Show/Hide](#))

Location Id

<input type="text"/>	Del: <input type="checkbox"/> Lookup	<input type="text"/>	Del: <input type="checkbox"/> Lookup	<input type="text"/>	Del: <input type="checkbox"/> Lookup
<input type="text"/>	Del: <input type="checkbox"/> Lookup	<input type="text"/>	Del: <input type="checkbox"/> Lookup	<input type="text"/>	Del: <input type="checkbox"/> Lookup

Update your partner information (ED Partners) ([Show/Hide](#))

Location Id

9551	Del: <input type="checkbox"/> Lookup	12096	Del: <input type="checkbox"/> Lookup	15151	Del: <input type="checkbox"/> Lookup
<input type="text"/>	Del: <input type="checkbox"/> Lookup	<input type="text"/>	Del: <input type="checkbox"/> Lookup	<input type="text"/>	Del: <input type="checkbox"/> Lookup

Update your partner information (Regulated Lenders) ([Show/Hide](#))

Location Id

<input type="text"/>	Del: <input type="checkbox"/> Lookup	<input type="text"/>	Del: <input type="checkbox"/> Lookup	<input type="text"/>	Del: <input type="checkbox"/> Lookup
<input type="text"/>	Del: <input type="checkbox"/> Lookup	<input type="text"/>	Del: <input type="checkbox"/> Lookup	<input type="text"/>	Del: <input type="checkbox"/> Lookup

View Partner Information

Update LINC – Lender Opt In and PIMS –with your location ID by:

- First, scrolling to the appropriate sections which are listed on the webpage alphabetically
- Second, select the appropriate boxes; see images to the left. Be sure to select the box that matches your SBA partner classification ..ie..CDC, Regulated Lender or Economic Development (ED)
- Lastly, click "Submit" located at the bottom of the page

GLS – Using PIMS to add LINC contacts

Skip Navigation Accessibility Options

TEST Capital Access Login System

Exit Help Profile Access Choose Function Switch Location Change Password

Welcome Elend Testing. Location 9551: Bank of America, National Association

Capital Access Login System - Choose Function

Currently Available Applications

- [Electronic Lending - Origination \(ETRAN\)](#)
- [Electronic Lending - Servicing \(ETRAN\)](#)
- [Lender Opt In](#)
- [Partner Information Management System \(PIMS\)](#)

If you do not see an application to which you believe you should have access, please ensure you have requested the access to the application. This can be done by selecting the application, then clicking on the "Request Access" button. If you have requested access to the application, but have not yet been approved by the applicable Program Office, please [Click here to contact Program Offices](#).

If any application is listed below, it means you have been granted access, but there may be an issue that is causing the application to not display as available.

- SBA's Online Phone Directory <[Down](#)>

Select the hyperlink for PIMS then search by your Location ID (*Please note, it may take a couple of days before you have access to PIMS*)

PIMS - Adding LINC contacts

TEST PIMS [Skip Navigation](#) [Accessibility Options](#)
[Reports](#) [Search](#) [Exit](#) [Help](#)
[Home](#) [Add New Partner](#) [Administration](#) [Documents](#)

Partner Name: **Bank of America, National Association** Partner ID: **582** Location ID: **9551**

Partner Information

Partner Name :

Partner ID: Location ID:

Primary Category: Established:

Partner Type: Status:

Charter: Open Locations:

SBA Office: Number of Subsidiaries:

Legal Type: Owing Partner :

Alias Type

Microlender #
Tax Identification Number

Physical Address:

:Fax :
:Phon :
:Web :

Contact Information

Kenneth D Lewis ,
Email:ken.d.lewis@bankofamerica.com Phone:704-386-5687 Fax:704-386-4578
[Add new phone, fax, emails, or web address for this contact...](#)

Contact SBA Roles

PIMS - Adding LINC contacts continued

TEST PIMS [Skip Navigation](#) [Accessibility Options](#) [Reports](#) [Search](#) [Exit](#) [Help](#)
[Home](#) [Add New Partner](#) [Administration](#) [Documents](#)

Partner Name: Bank of America, National Association Partner ID: 582 Location ID: 9551

Add New Contact

Partner ID / Name : 582 / Bank of America, National Association

Contact Information...

FIRST NAME	Stephen	LAST NAME	Jones
JOB TITLE		MAIL STOP	
PHONE		FAX	
EMAIL	nnamila@sba.gov		

Role Type Selection:
SBA EDMIS Contact
504 First Mortgage Pool Contact
SBA LINC Contact
SBA Delegated Authority Contact

Use the existing Location Address
Physical Address: 100 N Tryon St CHARLOTTE NC 28255

OR
 Lookup a location address for the Contact
OR
 Enter a new address for this Contact

Contact Address Information...

ADDRESS TYPE		ADDRESS 1		ADDRESS 2		CITY	STATE	POSTAL CODE
							Select State	
						UNITED STATES		

Select "Select SBA LINC Contact" for the role type, then complete the fields under the "Contact Address Information" section, then select "Save"

PIMS – Adding Areas of Interest to LINC Contacts

TEST PIMS [Skip Navigation](#) [Accessibility Options](#) [Reports](#) [Search](#) [Exit](#) [Help](#)
[Home](#) [Add New Partner](#) [Administration](#) [Documents](#)

Partner Name: **Bank of America, National Association** Partner ID: 582 Location ID: 9551 Date: 04-29-2015

Edit Contact

Stephen Jones
FIRST NAME
JOB TITLE
Email:

Primary SBA Contact Primary Communicat
 EWCP Contact Express Loans Cont
 Loan Liquidat
 SBA LINC Contact SBA Delegated Authority Contact SBA Guaranty Purchase Contact SBA EDMIS Contact

LINC Areas of Interest
[Add/Edit Areas of Interest for Linc Contact](#)
Bank already has 3 other contacts with LINC Areas
Click on the contact name to copy/replace the areas from that contact to this one.
[Jan Clark_AK \(29\) AZ \(15\) CA \(58\) CO \(64\) GA \(159\) PA \(66\) PR \(78\) VA \(132\) **Nirish Namilaa_AK \(29\) AZ \(15\) CA \(58\) CO \(64\) GA \(159\) PR \(78\)** \[Ryan Gerald_AK \\(29\\) AZ \\(15\\) CA \\(58\\) CO \\(64\\) GA \\(159\\) PA \\(33\\)\]\(#\)](#)

Partner Positions
 President Chief Executive Officer Commercial Loan Officer Executive Director
 Chairperson

Use the existing Location Address
Physical Address: 100 N Tryon St CHARLOTTE NC 28255

Enter a new address for this Contact
Select Type of Address
ADDRESS TYPE ADDRESS 1

Callout Box: Once the contact is added, select "Edit" under partner contacts, click on the hyperlink for the contact name, and "Add/Edit Areas of Interest for LINC Contact." This will allow the individual to receive LINC requests for specific geographic areas.

PIMS – Selecting Areas of Interest for Contacts

Partner Name: Bank of America, National Association Partner ID: 582 Location ID: 9551

Add/Edit Areas of Interest for LINC Program

Contact: Stephen Jones

State	Counties	Selected Counties
Tennessee	95	
Texas	98	
Utah		
Vermont		
Virgin Island		
Virginia	132	
Washington		
West Virginia		
Wisconsin		
Wyoming		

Code	County Name	Selected?
001	ADAMS	<input type="checkbox"/>
003	ASOTIN	<input type="checkbox"/>
005	BENTON	<input type="checkbox"/>
007	CHELAM	<input type="checkbox"/>
009	CLALLAM	<input type="checkbox"/>
011	CLARK	<input type="checkbox"/>

Selected: Colorado 64, Mississippi 82, Virginia 132

Buttons: Select All, Clear All, Done, Save Changes

<< BACK >>

Select the designated state and counties. Select "Done" and "Save Changes"

LINC – Lender Opt In

Note: Currently unavailable. Will be made available in the coming weeks. This feature is not required to receive and respond to LINC referrals.

The screenshot shows the 'Capital Access Login System - Choose Function' page. At the top, there is a navigation bar with 'TEST Capital Access Login System' and links for 'Exit', 'Help', 'Profile', 'Access', 'Choose Function', 'Switch Location', and 'Change Password'. Below the navigation bar, the page title is 'Capital Access Login System - Choose Function' with the subtitle 'Currently Available Applications'. A list of applications is displayed, including 'Electronic Lending - Origination (ETRAN)', 'Electronic Lending - Servicing (ETRAN)', 'Lender Opt In', and 'Partner Information Management System (PIMS)'. A blue arrow points from a text box below to the 'Lender Opt In' link. Another blue arrow points from the 'Lender Opt In' link to the 'Lender Opt In' link in the list. Below the list, there are two paragraphs of text: 'If you do not see an application to which you believe you should have access, please ensure you have requested the access to the application. This can be done by selecting the application, but have not yet been approved by the applicable Program Office, please [Click here to contact Program Offices.](#)' and 'If any application is listed below, it means you have been granted access, but there may be an issue that is causing the application to not display as available.' At the bottom of the list, there is a link for 'SBA's Online Phone Directory <Down>'. The SBA logo is visible in the bottom right corner of the page.

To view pending LINC requests from prospective borrowers, select Lender Opt In after logging into GLS

LINC – Lender Opt In – Search Pending Requests

Skip Navigation Accessibility Options

TEST LINC [Exit](#)

Testing, Elend Location: 9551-Bank of America, National Association

Search for Lender Opt In Requests

Select a Date Range for Opt in Requests and Who at you Bank to want to see them for.

Select Bank Contact:

Start Date:

End Date:

Select the desired bank contact (all contacts will appear in the drop down list that were added to PIMS as a LINC contact), search by a specific date range, and select submit.

LINC – Lender Opt In – View Pending Requests

Skip Navigation Accessibility Options
Exit

TEST LINC

Testing, Elend Location: 9551-Bank of America, National Association

Lender Opt In

Request Date: 03/30/2015	Opt in
Business Name	ENILE_MultCounty_WebTest
Zip Code	19096
County	DELAWARE,MONTGOMERY
State	PA
Number of Employees	15
Gross Revenue	\$250,000.00
Requested amount	Greater than \$5 million
Time in Business	New business
Type of Business	Manufacturer
	Non-profit
Use of Proceeds	Buying equipment,Refinancing debt,Working capital
Collateralized?	Y
Collateral Description	15000
Receiving Business Advisory?	N
Business Plan Exists?	Y
Other Funding Source Exists?	Y

After selecting submit, a list of pending requests will appear for the specified date range. Select "Opt In" to view the prospective borrower's contact information.

LINC – Lender Opt In – Borrower Information



LINC Applicant Information

Applicant Contact Information

Name
 Email
 Phone

Applicant Survey Data

Legal Business Name:	<input type="text" value="ENILE_MultCounty_WebTest"/>
What is the Zip Code for where the Business is located?	<input type="text" value="19096"/>
How many years has the business been in existence?	<input type="text" value="New business"/>
How many employees does the business have?	<input type="text" value="15"/>
What is the business's estimated annual revenue?	<input type="text" value="\$250,000.00"/>
Is the business a for-profit business?	<input type="text" value="Non-profit"/>
What is the business type?	<input type="text" value="Manufacturer : Optional"/>
What is the total amount of financing that you are seeking?	<input type="text" value="Greater than \$5 million"/>
How will you use the money?	<input type="text" value="Buying equipment,Refinancing debt,Working capital : Optional"/>
Is collateral available to support the loan?	<input type="text" value="Y : 15000"/>
Are you interested in receiving business advisory services (technical assistance)?	<input type="text" value="N"/>
Do you have a written business plan?	<input type="text" value="Y"/>
Have you applied for a loan with another financial institution?	<input type="text" value="Y"/>
Please provide a description of the current status of the business highlighting the reasons why you need financing.	<input type="text" value="Web Testing of when a Zip Code Spans Multiple Counties. Also Testing New Front End."/>