

# SBA One

## Loan Origination Solution

### March 2016 Communication

Since SBA One's launch in 2015, numerous system enhancements and changes have occurred as a direct result of User feedback. The following information addresses changes that were made as a result of the February 29<sup>th</sup> release.

#### **ENROLLMENT**

The SBA One enrollment process is fully integrated into Capital Access Financial Systems (CAFS). Users now have immediate access to SBA One once the requested SBA One access levels and privileges are approved by the Authorizing Official (AO), Program Office and CLS security team. For more detailed instructions on how to enroll for SBA One, please see the SBA One Enrollment Instructions located on SBA.gov as listed under additional information on this handout.

Additionally, Users may input their own loan details versus using only the boilerplate text.

Finally, if there is a secured guarantor, the security is now grouped with the guarantor details.

#### **LOAN & CREDIT MEMO DETAILS REPORT**

Once the Underwriting section is complete, Users may print out the Loan & Credit Memo details report for audit and reconciliation purposes. This report will also include the user responses to each question in the loan application.

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#### **Additional Information**

For more information on SBA One, including detailed versions of all the application's release highlights, please visit the following website: <https://www.sba.gov/content/sba-one>

#### **Questions? Comments?**

If you have questions on SBA One, please contact our support team:  
[Email: SBA.One@bnymellon.com](mailto:SBA.One@bnymellon.com)  
[Phone: 877-245-6159](tel:877-245-6159), Call option 5

#### **AUTHORIZATION DOCUMENT**

The release brought with it many enhancements to the Authorization document. Users now have the ability to generate a draft authorization as well as save it in a Word format to allow for edits and subsequent manual uploads.