



U.S. Small Business
Administration



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MySBA Lender Portal

**Lender Match 2.0
Partner Instructions**

March 2024

MySBA Lender Portal Overview

On February 27, 2024, the SBA launched an updated version of Lender Match. The new Lender Match platform is integrated into the new MySBA platform and provides access to customer originated Lender Match leads.

The New Lender Match 2.0 is a free online tool developed by the U.S. Small Business Administration (SBA) to help connect small businesses with SBA-approved Community Development Financial Institutions (CDFIs) and small lenders to streamline the lending process. SBICs are also welcomed into the program with the refresh platform.

Lenders may register/sign in for **MySBA Lender Portal** at <https://lending.sba.gov/lenders/>

What's new to Lender Match?

- An initial Know Your Customer (KYC) report will be given to lenders before opting into a lender match
- Lenders can manage settings, review matches, opt-in to matches, and provide follow-up details
- Lenders can pause and activate participation in the program
- Lenders are presented to potential borrowers at once with customizable listings
- Lenders who underwrite and fund loans through the platform will be used to provide this feedback to the SBA

Device: We recommend accessing the MySBA Lender Portal on a computer.

Browser: The MySBA Lender Portal must be accessed by using a compatible browser:

- Google Chrome Version 90+
- Microsoft Edge Version 90+
- Firefox Version 88+

Training Video: [Lender Match comes to MySBA - Access and Training Material](#)



Lender Match Enrollment

Register on MySBA Lender Portal

Instructions

1. Go to [MySBA Lender Portal](https://lending.sba.gov/lenders/)
2. Click on **Register for MySBA** if you do not have a registered CAFS account
3. For existing users, click on **Sign In** and input your CAFS credentials to login
4. Notice the Commentary Note at the top of the next window*

Note: Once you click on **Register for MySBA**, you will be redirected to the Capital Access Financial Systems (CAFS) registration page. For additional assistance to set up a new account on CAFS, refer to [CAFS_CLS_PartnerAccountSetupInstructions.pdf \(sba.gov\)](#) also located in the Help Menu.

Reminder: Accounts are deactivated after 90 days of inactivity

1 <https://lending.sba.gov/lenders/>

2 Register for MySBA

3 Sign In

4 **Commentary:**
ATTENTION: This page does not apply to SBA borrowers
 SBA borrowers: Visit <https://dlap.heta.lending.sba.gov> and register a MySBA Lending Portal account to make payments and manage your loan all in one place.
 The following users can create a Capital Access Financial System account using this form:

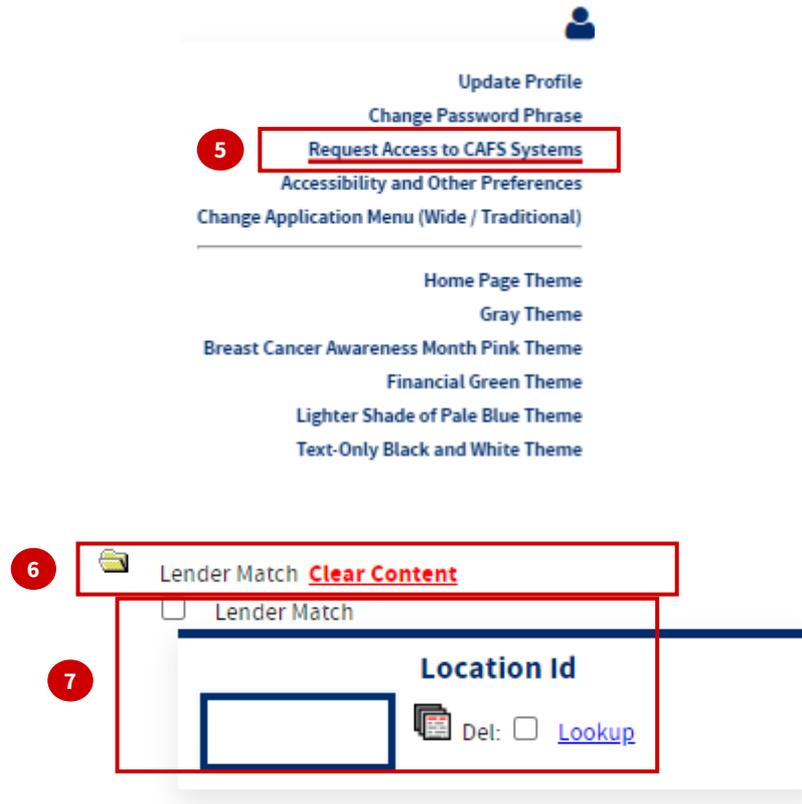
- Partners (ex. lenders)
- CDC Closing Counsel
- SBA Agents, Contractors and Employees
- External Auditors and Investigators
- Other Federal Agency Employee

Requesting Access to Lender Match

Instructions

- On [Capital Access Financial System \(sba.gov\)](https://capitalaccessfinancial.sba.gov), go to the **Settings Menu** at the top right of the screen and select **Request Access to CAFS Systems**
- Click on the **Lender Match** folder icon to expand the file's options
- Select the **Lender Match** checkbox, enter in your financial institution's Location ID, and press **Submit**

Note: Your Authorizing Official (AO) will need to approve your requests. If you are your own AO, you will approve your own requests. All pending requests will then go through the decision process with the SBA. Usually within 1-2 business days, you will receive notification via email with their decision.





Accessing your MySBA Lender Portal Account

Lender Match Enrollment Process

Instructions

- Once your Lender Match role has been approved, please **Sign In** to [MySBA Lender Portal](#) to begin preparing a four-step request form for borrowers to search for SBA-approved lenders

Lender Match Settings

Instructions

- During setup, you will be prompted with **seven essential steps** to determine what small business you will be matched with
- For each lender account, you can create multiple lender profiles with different settings that can be activated, edited, and created on the **Lender Match Setting Profiles** page. You will also be able to filter match tasks based on these profiles.
- In addition, Lender Match 2.0 will allow adding a **webhook** to collect match data through an API (Application Programming Interface)

The screenshot displays the MySBA Lender Portal interface. At the top, a navigation bar includes links for Home, Work Tasks, 1502 Reporting, Lender Match, and a user profile (jmoore65). The main content area is titled "Lender Match Setting Profiles" and contains a table with the following data:

ID	Setting Profiles	Status	Actions
#2156	Default Settings	Active	Pause Matches View Match Settings Edit Match Settings Manage Webhooks
#2155	Commercial Lending	Active	Pause Matches View Match Settings Edit Match Settings Manage Webhooks
#2154	SBA Guaranteed Loans	Paused	Activate Matches View Match Settings Edit Match Settings Manage Webhooks

Below the table is an "Add Settings Profile" link. To the right, a sidebar shows the "Lender Match Webhooks" section, which includes a "Default Settings" link and a "Webhook Logs" table with columns for "Event" and "Date".

Numbered red dots (1-7) indicate the following steps in the setup process:

- Enter Loan Range
- Select Industry Types
- Use of Proceeds
- Additional Fields
- Areas of Interest
- Review Summary

Five Banking Settings Steps

Instructions

- On the **Bank Settings** page, you can optimize how you will be presented to interested businesses. Your institution can customize your match listing by adding the following:
 - Institution logo
 - Contact details
 - A subtitle
 - A description of your offerings
 - An application URL
- Using the same form to edit settings when enrolling in the Lender Match program, you can select a **range** of minimum and maximum loan amounts. Also, you can be matched with all or a few industry types, use of proceeds, or locations

The image displays two screenshots of the MySBA Lender Portal interface. The top screenshot shows the 'Bank Settings' page, which includes a form for configuring how the lender's listing is presented to borrowers. A red box highlights the form fields, and a red dot labeled '5' is positioned next to the 'Bank Settings' menu item in the left sidebar. The form includes sections for 'Bank Logo', 'Contact Info', and 'Loan Details & Description'. Below the form, a preview of a lender listing for 'Hometown Bank' is shown, featuring the bank's logo, contact information, and loan terms.

The bottom screenshot shows the 'Industry Types' and 'Loan Ranges' pages. A red box highlights the 'Industry Types' form, which includes a question 'Would you like to provide lending to all the industries below?' and a list of industry types with checkboxes. A red dot labeled '6' is positioned next to the 'Industry Types' menu item in the left sidebar. Below the 'Industry Types' form, the 'Loan Ranges' form is visible, which includes a question 'Would you like to filter matches by a loan range?' and a slider for 'Loan Minimum and Maximum'.

Managing Potential Matches

Instructions

- You can **Pause Activity** for the Lender Match program at any time on the Lender dashboard
- Lender Partners will continue to receive an **email** with all the details of a match request, including contact information

A new potential match is ready for you to review.

Business name: John Doe's Pizza

Business website: <https://johndoespizza.com>

Business description: We serve new york style pizza for live events in our city park.

Industry: Accommodation and Food Services

Experience: 5+ years

Requested amount: \$50000.00

Use of funds: Purchasing Equipment

Use of funds description: buying new pizza ovens will help us triple our capacity.

Written business plan: None

Financial projections: True

Generating revenue: None

Revenue: \$250000.0

MySBA Task System

Instructions

1. In the new MySBA Lender Portal, you will be notified of matches in our task system and can assign match review tasks to individuals or groups
2. Also, advanced sorting and filtering options are available to your team to access preferred match tasks
 - a. Search **Tasks**
 - b. Tasks **Filters**
 - c. The **Actions** button allows you to unassign the task, assign the task and view a match task

U.S. Small Business Administration MySBA Lender Portal

Home Work Tasks 1502 Reporting Lender Match jmoore65

My Tasks

More Filter: All High Priority Critical Non-Actionable Past Due My Custom Views

Request Type	Task	Sub Task	Reference	Name	Task Status	Priority	Due Date	Actions
Inbox	Post Submission	Capture (main)	#694393629	James S	In Progress	High	May 3, 2023	Actions
Lender Match	Lender Match	Review Borrower Match	#2159	Mason Pizza LLC	In Progress	Medium	May 3, 2023	Actions
Lender Match	Lender Match	Borrower Contact	#2167	Brenton Dance Studio	In Progress	Medium	May 3, 2023	Actions

Rows per page: 5 1-2 of 6

Lender Opt-In/Opt-Out Tasks

Instructions

1. Expanding the red arrow by **Business Details**, the **Match Details** will include contents of the request made by a business owner.
2. The **Match Opt-In Deadline** and **Match Criteria** shows you when and how all opted-in matches will be presented to the potential borrower
3. The **Risk Review tab** will include the potential borrower's basic KYC and risk review results, which can help influence your opt-in decision
4. Choose to opt in or out of a lender's match by using the **Opt-In/ Opt-Out Action**. You will be excluded from the match listing if an action is not taken

The screenshot displays the MySBA Lender Portal interface. At the top, there are navigation tabs: Home, Work Tasks, 2022 Reporting, Lender Match, and jason. Below this, a header bar shows Request ID 2159, Current Task Review Borrower Match, Assigned to Jon Smith, Business Name Mason Pizza LLC, Product Lender Match Requests, Requested Amount \$75,000, and Loan Risk N/A.

The main content area is titled "Lender Opt In/Opt Out" and "Borrower Match Review". A notification banner states: "Interested Lender Results will be presented to the borrower Monday, May 5th 2024 at 12:00 AM EST". A "Match-CR" button is visible in the top right.

Callout 1 points to the "Business Details" tab in the left sidebar. Callout 2 points to the notification banner. Callout 3 points to the "Risk Review" tab in the left sidebar. Callout 4 points to the "Opt In", "Opt Out", and "Close" buttons at the bottom right.

The "Match Details" section includes the following information:

Business Name	2159
Tax ID	XXXX-XX-3725
DUNS	580407303
Business Website	https://mybusiness.com
Business Description	Sed ut perspiciatis unde omnis iste natus error sit voluptatem accusantium doloremque laudantium, totam rem aperiam, eaque ipsa quae ab illo inventore veritatis et quasi architecto beatae vitae dicta sunt explicabo.
Bankruptcy/Insolvency?	No
Franchise	No
Number of Employees	25
Number of Jobs Retained	5
Number of Jobs Created	12
City	Jamestown
State	TX
Zip	57463

At the bottom, a section titled "What is happening now?" explains: "If you choose to opt in to this match, your listing will be included in the list of interested Lenders presented to the borrower. They will then choose a Lender to finish applying for a loan with. If they choose your offering they will be directed to your loan application provided in the Lender Match settings and you will be notified with a new task that includes the borrowers contact details."

How a Match is Presented to Potential Borrowers

Instructions

1. After two business days have passed, all lenders who chose to opt into a match will be presented on the borrowers' screen
2. Potential borrowers can review all the matches and express interest to multiple lenders
3. When borrowers click on the interested button from a lead, it will navigate to the lender's application link

SBA Lender Match Request Summary

SBA Lender Match for Parsons Farm Inc
Request #1003

Current Status: Waiting for Matches | Industry: Agriculture | Requested Amount: \$55,000.00 | Use of Funds Description: Buying an Existing Business

What's happening right now?
The lender matches will now review your info and send a decision to provide an interest in your business applying for a TIA loan. Please review and decide on offers as they come in.

Progress: Request Submitted → Searching for Lender Interest → Receive Offers from Lenders

Lender Matches (2) | **Documents & Notices** (0)

Lender	Loan Details	Action
HOMETOWN BANK Interested Lender James Mason 555-555-5555 jmason@hometownbank.com	Hometown Bank CanBest Meet Your Needs Intro Balance transfer APR - 0% for 21 Months Regular Balance transfer APR - 19.24% - 29.99% Variable Balance Transfer Fee - Intro fee 3% of each transfer, (\$5 min) completed within the first 4 months of account opening. No Annual Fee - \$0.00	<input checked="" type="checkbox"/> You have expressed interest Visit Lender Application
COMMUNITY BANK Interested Lender Rachel Smith 555-555-5555 rsmith@bank.com	Why apply for a loan from Community Bank? Intro Balance transfer APR - 0% for 21 Months Regular Balance transfer APR - 19.24% - 29.99% Variable Balance Transfer Fee - Intro fee 3% of each transfer, (\$5 min) completed within the first 4 months of account opening. No Annual Fee - \$0.00	<input type="checkbox"/> Yes, I am Interested <input type="checkbox"/> Yes, I am Interested
BRIDGE LINE LENDING Interested Lender	A Better Borrowing Experience Intro Balance transfer APR - 0% for 21 Months Regular Balance transfer APR - 19.24% - 29.99% Variable Balance Transfer Fee - Intro fee 3% of each transfer, (\$5 min) completed within the first 4 months of account opening.	<input type="checkbox"/> Yes, I am Interested

Borrower Click-through Tasks

Instructions

1. When a borrower expresses interest in you as a lender, **Borrower Click-through Tasks** are generated
2. As you service the loan application, **Borrower Contact Details** are provided for reference
3. The **Follow Up Questions** are designed to collect data on how you work the loan application for this borrower, and impact your sort order when being presented to future matches

Request ID: 2159 | Current Task: Review Borrower Match | Assigned to: Jon Smith | Primary Borrower: Mason Pizza LLC | Product: SBA 7(A) Loan | Requested Amount: \$75,000 | Loan Risk: N/A

Borrower Click-through

Borrower Details

The following contact information has been provided by the borrower you have opted into for an SBA guaranteed loan. Please record contact.

Contact Name	Elizabeth Mason
Contact Phone Number	555-555-5555
Contact Email	Mason Pizza LLC

What is happening now?
The Borrower has selected you as the desired lender. They have been provided with your application link and you can contact this business to follow up.

Borrower Lead Follow Up

What are these follow up questions important?
Leads are underwritten and funded will increase your ranking amongst lenders when being presented for future borrowers.

Did the borrower submit an application? * Yes No

Have you underwritten this loan? * Yes No

Have you funded this loan? * Yes No

What type of loan was funded? * Commercial SBA Guaranteed

Save Submit Match Data

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MySBA Lender Portal Highlights

- Capability to setup multiple bank matching profiles and use functional settings to manage matches
- Supports API integration to make API calls to consume leads and provide feedback to SBA
- Offers an available webhook to allow you to build an integrated application experience from the MySBA platform

The screenshot displays two main sections of the MySBA Lender Portal interface. The top section, titled "Lender Match Settings", features a table with three columns: "Settings Profile", "Status", and "Actions".

Settings Profile	Status	Actions
Default Settings	Active	Actions v
More settings	Active	Actions v
My Settings	Draft	Actions v

Below the table is a link labeled "Add Settings Profile".

The bottom section, titled "Lender Match Webhook", contains a form for configuring the webhook. It includes a "Webhook Settings" header with a "Webhook Logs" link. The form has the following fields:

- Webhook Enabled***: Radio buttons for "Yes" (selected) and "No".
- URL***: A text input field with a masked value ".....".
- Secret***: A text input field with a masked value ".....".
- Submit Changes**: A red button at the bottom of the form.

The interface also shows a top navigation bar with the SBA logo, "U.S. Small Business Administration", "MySBA Lender Portal", "Flynn Street (604)", and a "Claim Next Task" button. The bottom of the page includes a footer with copyright information, contact details, and a "Need Help?" button.

Customer Support

Additional resources available on SBA.gov:

- [Contact SBA](#)



CAFS Support Contact Center:

- **Phone:** 1.833.572.0502
(Monday through Friday, 8:00am to 8:00pm ET)
- **Email:** cls@sba.gov