



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](#)



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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.beta.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

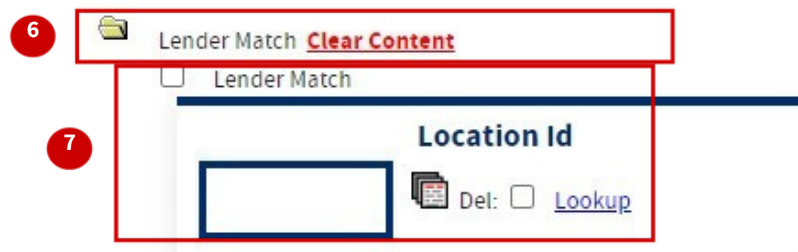
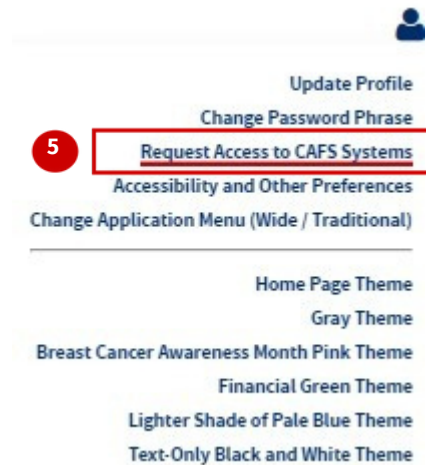
5. The red dots correspond to the numbered instructional step on the left side of the screen

Requesting Access to Lender Match

Instructions

- On [Capital Access Financial System \(sba.gov\)](https://capitalaccessfinancialsystem.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.





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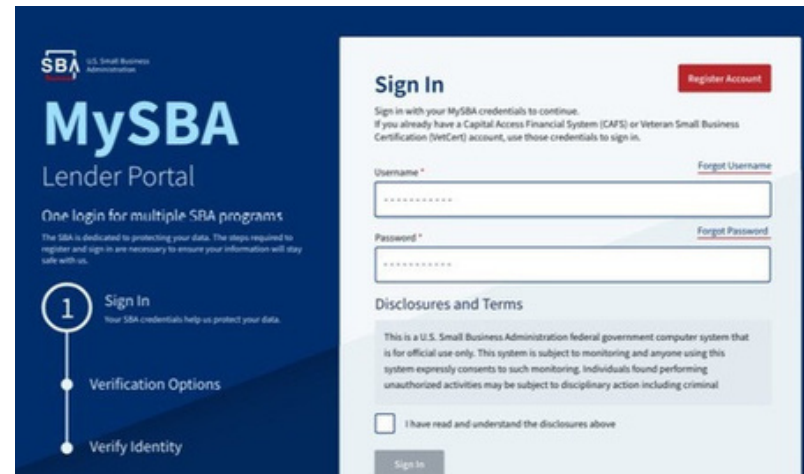
Access

Accessing your MySBALender Portal Account

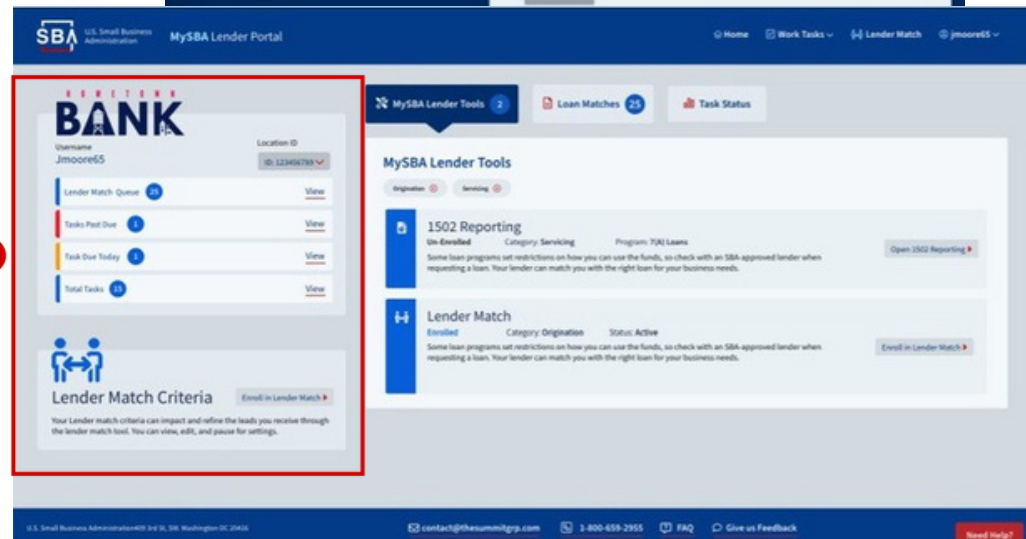
Lender Match Enrollment Process

Instructions

1. 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



The image shows the 'Sign In' page of the MySBA Lender Portal. It features the SBA logo and the text 'MySBA Lender Portal'. Below this, it says 'One login for multiple SBA programs' and 'The SBA is dedicated to protecting your data. The steps required to register and sign in are necessary to ensure your information will stay safe with us.' There are two main sections: 'Sign In' and 'Register Account'. The 'Sign In' section has fields for 'Username' and 'Password', both with 'Forgot' links. Below these is a 'Disclosures and Terms' section with a checkbox for 'I have read and understand the disclosures above' and a 'Sign In' button.



The image shows the 'MySBA Lender Portal' dashboard. It features a header with the SBA logo and 'MySBA Lender Portal'. Below this, there are navigation links: 'Home', 'Work Tasks', 'Lender Match', and 'Jmoore65'. The main content area is divided into two columns. The left column, highlighted with a red box and a red dot labeled '1', contains a 'BANK' section with a 'Location ID' field, a 'Lender Match Queue' table, and a 'Lender Match Criteria' section. The right column contains a 'MySBA Lender Tools' section with a '1502 Reporting' section and a 'Lender Match' section. The footer contains contact information and a 'Need Help?' button.

The red dots correspond to the numbered instructional step on the left side of the screen

Lender Match Settings

Instructions

2. 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
3. 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
4. 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 Jmoored5. Below the navigation bar, a horizontal bar contains seven numbered steps: 1. Enter Loan Range, 2. Select Industry Types, 3. Use of Proceeds, 4. Additional Fields, 5. Areas of Interest, 6. Review Summary, and 7. Review Summary. The main content area shows the 'Lender Match Setting Profiles' table, which lists profiles with IDs, names, and statuses. A red dot labeled '3' points to this table. Below the table, there is a section for 'Add Settings Profile'. To the right, a modal window titled 'Lender Match Webhooks' is open, showing a 'Webhook Logs' table. A red dot labeled '4' points to this modal.

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

Five Banking Settings Steps

Instructions

5. 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
6. 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 SBA MySBA Lender Portal. The top screenshot shows the 'Bank Settings' page, which includes fields for 'Bank Logo', 'Contact Info', and 'Loan Details & Description'. A red box highlights the 'Bank Settings' section, and a red dot with the number '5' is placed next to it. The bottom screenshot shows the 'Industry Types' page, which includes a section for 'Loan Ranges' with a slider for 'Loan Minimum and Maximum'. A red box highlights the 'Loan Ranges' section, and a red dot with the number '6' is placed next to it. Both screenshots also show a 'Bank Settings' sidebar on the left and a 'Bank Settings' header at the top.

Managing Potential Matches

Instructions

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

The screenshot displays the MySBA Lender Portal interface. The top navigation bar includes links for Home, Work Tasks, 1502 Reporting, Lender Match, and a user profile dropdown. The main dashboard area is divided into sections for 'MySBA Lender Tools' (with sub-sections for 1502 Reporting and Lender Match) and a 'Lender Match Criteria' section. A red dot labeled '7' is positioned next to the 'Pause Matches' link in the Lender Match section. Below the dashboard, a 'New Potential Match' email notification is shown, featuring a red dot labeled '8' next to the 'Email This Lead' link. The email content provides details for a potential match, including business name, website, description, industry, experience, requested amount, use of funds, and financial projections.

MySBA Lender Portal

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Home Work Tasks 1502 Reporting Lender Match jmoore65

MySBA Lender Tools

Originating Servicing

1502 Reporting

Enrolled Category: Servicing Program: 71(a) Loans

Some loan programs set restrictions on how you can use the funds, so check with an SBA-approved lender when requesting a loan. Your lender can match you with the right loan for your business needs.

Open 1502 Reporting

Lender Match

Enrolled Category: Origination Status: Active

Some loan programs set restrictions on how you can use the funds, so check with an SBA-approved lender when requesting a loan. Your lender can match you with the right loan for your business needs.

View Lender Match Tools View Current Settings Edit Match Settings

8 Email This Lead

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 Filters **b** High Priority Critical Non Actionable Post Due My Custom Views

a Search All Columns

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	c Actions
Lender Match	Lender Match	Borrower Contact	#2167	Brenton Dance Studio	In Progress	Medium	May 3, 2023	Actions

Rows per page: 5 1 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

MySBA Lender Portal

Request ID: 2159 | Current Task: Review Borrower Match | Assigned to: Jan Smith | Business Name: Mason Pizza LLC | Product: Lender Match Requests | Requested Amount: \$75,000 | Loan Risk: N/A

Lender Opt In/Opt Out

Borrower Match Review

Interested Lender Results will be presented to the borrower Monday, May 5th 2024 at 12:00 AM EST

Match Criteria

Business Details | Industry | Request Details

Match Details

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

What is happening now?

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 borrower's contact details.

Close Opt Out Opt In

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

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 7(a) 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	Actions
HOMETOWN BANK Interested Lender James Mason 555-555-5555 jmason@hometownbank.com	Hometown Bank Can Best 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, (\$1 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, (\$1 min) completed within the first 4 months of account opening. No Annual Fee - \$0.00	<input type="checkbox"/> Yes, I am Interested
WOODLINE 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, (\$1 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

The screenshot displays the 'MySBA Lender Portal' interface. At the top, there's a navigation bar with links for Home, Work Tasks, 1502 Reporting, Lender Match, and a user profile. Below this, a header section contains metadata: 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), and Loan Risk (N/A). The main content area is titled 'Borrower Click-through' and includes tabs for Messages, Notes, and Request Details. A red box labeled '1' highlights this header. Below it, the 'Borrower Details' section provides contact information for Elizabeth Mason, including her phone number (555-555-5555) and email (Mason Pizza LLC). A red box labeled '2' highlights this section. Further down, the 'Borrower Lead Follow Up' section contains a question about the importance of follow-up questions and a series of yes/no questions regarding the application and funding process. A red box labeled '3' highlights this section. At the bottom right, there are 'Save' and 'Submit Match Data' buttons. The footer includes copyright information and contact details.

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 image displays two overlapping screenshots of the MySBA Lender Portal interface. The top screenshot shows the 'Lender Match Settings' page, which features a table with columns for 'Settings Profile', 'Status', and 'Actions'. The table lists three profiles: 'Default Settings' (Active), 'More settings' (Active), and 'My Settings' (Draft). Each row has an 'Actions' button with a dropdown arrow. Below the table is a link to 'Add Settings Profile'. The bottom screenshot shows the 'Lender Match Webhook' configuration page. It includes a 'Webhook Settings' section with a 'Webhook Enabled' toggle set to 'Yes'. Below this are input fields for 'URL' and 'Secret', both masked with dots. A red 'Submit Changes' button is at the bottom. The portal's header includes the SBA logo, 'MySBA Lender Portal', and navigation links like 'Dashboard', 'My Tasks', and 'Group Tasks'. The footer contains copyright information and a 'Need Help?' link.

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

[Add Settings Profile](#)

Lender Match Webhook

Webhook Settings [Webhook Logs](#)

Webhook Enabled*

☒ Yes ☐ No

URL*

Secret*

[Submit Changes](#)

Customer Support

Additional resources available on SBA.gov:

- [Contact SBA](#)



CAFS Support Contact Center:

- **Email:** cls@sba.gov