



To support lenders correcting the EIN on their PPP loans, SBA OCA is providing a self-serve option in CAFS at https://caweb.sba.gov/cls/dsp_login.cfm.

Requirements:

- a. To use the self-serve option, you must have Loan Servicing update rights in CAFS.
 - b. The loan must be one of the statuses listed below.
 - i. Active Un-Disbursed
 - ii. Disbursed Current
 - iii. Lender Deferred Disbursed
 - iv. Past Due Disbursed
 - v. Delinquent Disbursed
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- 1) Log into https://caweb.sba.gov/cls/dsp_login.cfm using a ***user id, password, and pin.***
 - 2) Go to the **Loan** tab and select **Electronic Lending- Servicing (ETRAN)**.
 - 3) At the top of the screen, select **Search**.
 - 4) Enter the loan number in ETRAN Servicing and press **Enter**.
 - 5) On the left side of the screen, go to the **Borrower's** tab.
 - 6) Under Borrower, go to the **Principal**.
 - 7) Make sure the percentage of ownership and an option from the "Controlling Interest Management" dropdown menu (owner of the concern, etc.) is selected for the principal(s). If the controlling interest and percentage of ownership are not entered, update the two data fields and select save at the bottom of the screen.
 - 8) Under Borrower, select "**New Borrower**".
 - 9) For the new borrower, enter the correct entity (business/EIN or business/SSN). Make sure the lender selects an option from the "Controlling Interest Management" dropdown menu (owner of the concern is fine) or the co-borrower



will not save. Fill out the remainder of the co-borrower’s information then select **Save/Next**.

10) Once the co-borrower is entered and save/next is selected, the lender will be brought into the principal’s screen where they should add the principal(s) of the co-borrower. The lender needs to make sure they enter the percentage of ownership and select an option from the “Controlling Interest Management” dropdown menu for each principal of the co-borrower. Fill out the remaining information on the principal’s screen then select **Save/Next**.

11) After the above steps are completed, the lender should select the “**Change Primary Borrower**” icon at the top of the screen. See below.



12. On the “Change Primary Borrower” screen, select the correct entity (co-borrower). Select **Save**.

*** Change Primary Borrower Screen**

Primary Borrower?	TaxId	Name	Controlling Interest	Controlling Interest Management
<input type="radio"/>		new taxid	Yes	Chairman of the Board
<input checked="" type="radio"/>		first created	Yes	Primary Borrower

Reset Clear Save

13. After the co-borrower is changed to the primary business and saved, the lender should go back into the loan by selecting the “**Loan**” icon at the top of the screen.



14. On the loan page, select the incorrect entity (borrower 1), then scroll to the bottom right hand corner of the screen and select the **“Delete”** icon.
15. Confirm that the incorrect entity has been removed.