



SBA Information Notice

TO: All SBA Employees and CDC Online Users

CONTROL NO.: 5000-17011

SUBJECT: CDC Online Migration to Capital Access Financial System (CAFS)

EFFECTIVE: 10/30/2017

The Office of Capital Access (OCA) will transition CDC Online from the SBA 504 CSA Services website (<https://sba504servicing.wellsfargo.com/SBALogonApp/application/login.jsp>) to the Capital Access Financial System (CAFS). Effective 10/30/2017, CDC Online users must access CAFS via https://caweb.sba.gov/cls/dsp_login.cfm. All Certified Development Companies (CDCs) must request access to ETRAN Servicing and CDC Online through CAFS.

Users with an existing CAFS login only need to update the account to add the CDC Online role. When an account change is requested (including access privileges and roles), an email will be sent to the appropriate approving official (manager/supervisor for government employees, Contract Officer Representative (COR) for contractors, and authorizing official for CDCs). If the appropriate approving official does not respond within 48 hours, the request will be deleted, and the user must make a second request. The instructions for adding a role are located at: <https://caweb.sba.gov/cls/help/CAFS%20ROLES%2021%20November%202015FINAL.pdf>

New CAFS accounts require each user to have an authorizing official in the system. The authorizing official is responsible for approving accounts and recertifying the accounts bi-annually. When a new user requests an account (government, contractor, and partner) an email will be sent to the user and the appropriate approving official (manager/supervisor for government employees, COR for contractors, and authorizing official for partners). If the user and/or approving official do not respond within 48 hours, the request will be deleted, and the user must make a second request. The instructions for creating an account are at: <https://caweb.sba.gov/cls/help/CAFS%20NEW%20ACCOUNT%2021%20November%202015FINAL.pdf>

What will be affected?

Users will be able to perform the same functions as with CDC Online, with the following changes:

- (1) Similar look-and-feel/interface to match the SBA E-TRAN system.
- (2) Prepayment functionality will be located in the ETRAN Servicing application within CAFS. The prepayment functionality allows users to request the Prepayment Work Up Cover Letter, Prepayment Release Letter, Prepayment Requests and other reports.

(3) Acceleration functionality (Acceleration Loan Entry and other reports) will be located in the ETRAN Servicing application within CAFS.

(4) The printing format will transition to SBA's current printing functionality within the ETRAN application. This format is a print screen of the page that the user is attempting to print. Previous CDC Online functionality provided a template for each specific CDC Online-generated report.

The Central Servicing Agent (CSA) will provide training to all CDC Online users. This training will detail the new look-and-feel of the application and functionality changes. The following training sessions will be offered:

Oct 18 - Demo at NADCO Annual Meeting through screen shots/Q&A format at the CSA booth

Oct 25 - Second training through WebEx and PowerPoint

Who will be affected?

SBA employees and CDCs who use CDC Online will be affected by this change.

Notice and Questions

SBA field offices must notify CDCs of this Notice. For additional information or questions regarding this Notice, please send an email to Steve Kucharski (Stephen.Kucharski@sba.gov) or Ron Whalen (Ronald.Whalen@sba.gov).

Questions on setting up an account or adding a role to an account in CAFS should be sent to CLS@sba.gov

Best regards,

Steve Kucharski
Director
Office of Performance and Systems Management
Office of Capital Access