


Step One: New Capital Access Financial System Account (CAFS) - Link: [New Partner CAFS Account](#)

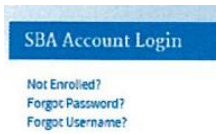
Prerequisites: Lender Agreement, HQ Location ID, and a Lender's Authorizing Official



1. Go to <https://caweb.sba.gov/cls/> - under the  (right side) is a drop list of instructions



2. Under “SBA Account Login” (left side), select “Not Enrolled”



3. Complete all sections:

Identity Information User type = Partner

Contact Information (use financial institution information not personal)

- Enter Zip then Click “Look up Zip” to get city and state information then complete street address
- Phone number: in box one you enter numeric 1

Partner Information

- HQ Location ID (Charter (Main) Location) (Do not use branch location)
- Do not check Job classification, unless you are authorizing official, LINC Contact or Loan Service Provider
- If you are the first time authorizing official at your institution, check authorizing official

Supervisor Information

- That they need to click “lookup supervisor by email or first name/last name” to get the available authorizing officials to populate in the drop down menu


If signing up as your lender’s first authorizing official “supervisor information will **not** be available” Link: [Authorizing Official Set-Up](#)
Complete the Verify Section and “Submit”

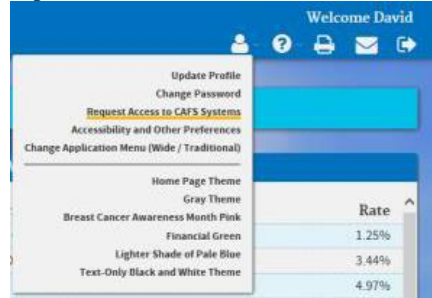
4. You will receive an email to verify your email address. You must click the link in the email to verify your address within 48 hours.

5. After your Authoring Official and SBA have approved the request, you will receive an approval email for cls@sba.gov.

Step Two: Request access to Capital Access Financial System (CAFS) Selections

Prerequisites: CAFS Account

1. Login at <https://caweb.sba.gov/cls/>
2. Select the person icon (top right)  Drop Down Menu



3. Select Request Access to CAFS Systems

Capital Access Login System - System Selection

- 7A Connect - Access only for SBA 7a Lenders and SBA Employees
- Code Tables
- Electronic Lending - Origination (ETRAN)
 - Enter/Edit your SBA Loan Applications (includes Read) [\(Show/Hide\)](#)
 - SFTP Submission of E504 Documents by CDC [\(Show/Hide\)](#)
 - View your SBA Loan Applications [\(Show/Hide\)](#)
- Electronic Lending - Servicing (ETRAN)
 - Update your Lender's SBA Loans (includes Read) [\(Show/Hide\)](#)
 - View your SBA Loans [\(Show/Hide\)](#)
- Intermediary Lending Program Electronic Reporting System
- LINC
- MicroLoan Program Electronic Reporting System (MPERS)
- Microlender Intermediary Application System
- Partner Information Management System (PIMS)
- SBA One

4. Select Folder “7A Connect” – Enter Charter Location ID “HQ” also “used in creating your CAFS account”
5. Select Folder “Electronic Lending Origination”
 - a. Check Enter/Edit Loan Applications and enter in the first box your HQ Location ID
 - b. Check View your SBA loan application and enter in the first box your HQ Location ID
6. Select Folder “Electronic Lending Servicing”
 - a. Check Update your Lender’s SBA Loans and enter in the first box your HQ Location ID
 - b. Check View your SBA Loans and enter in the first box your HQ Location ID
7. Select Folder “Partner Information Management System” (PIMS)
 - a. Check View and enter your HQ Location ID
8. Select Folder “SBAOne” Link: [SBA One Set-Up](#)
 - a. Check all items and enter HQ Location ID in respective boxes
9. Submit (bottom of page)
10. You will receive an email that the account has been updated (this is not approval for access)
11. After reviewed by the Authorizing Official and SBA, you will receive an approval email from cls@sba.gov.

Once you login, you will see “Loans” with a drop down menu on the lighter blue bar. ETRAN Applications and SBAOne will be part of the loan menu.



After account is established, and you login and it shows your account is inactive, call the number on the inactive message or email cls@sba.gov for assistance. (Provide your contact information and headquarter location id in the email)