

# Capital Access Financial Systems (CAFS)

## Partner Instructions [signing up to be an authorizing official](#)

CAFS is accessed via the production URL at <https://caweb.sba.gov> and the test URL at <https://catweb2.sba.gov>. User Accounts defined as a Partner user-type (Such as *Institution Name* is) require each user account to have an institutional level Authorizing Official (AO) from their location linked to their profile in the CLS system. The AO acts as an over-seeer for CLS related issues, and is the first decision level for partner user account and role requests for the partner. AOs also are responsible for recertifying (verifying users and role permissions) the accounts bi-annually. All institutions should designate at least one person (though a minimum of 2 are recommended) to be the AO.

**Prerequisite(s): Lender or LSP agreement and HQ location id.**

### NEW ACCOUNT USERS

1. Go to the production or test URL.
2. On the left side of the page under “SBA Account Login”, select “Not Enrolled”.
3. Complete all sections in the profile.
  - a. Under User Information
    - i. Select “Partner” for user type
    - i. Enter the Location Id as the “Customer Location”. The location id is on the SBA agreement. (NOTE: LSPs should enter the location id associated with their LSP agreement.)
    - ii. Select “Authorizing Official” under “Job Classification”
  - b. Under “Supervisor Information”
    - i. Enter your email address, first name, and last name.
    - ii. Send an email to [cls@sba.gov](mailto:cls@sba.gov) with subject “PRODUCTION Authorizing Official Approval Request” OR “TEST Authorizing Official Approval Request”. In the email, state that you are requesting to be an authorizing official for your location id.
4. You will receive an email verifying your email address. You must click the link in the email and verify your email address within 48 hours. If you do not respond within 48 hours, the request will be deleted.

You will receive an email from [cls@sba.gov](mailto:cls@sba.gov) that your account has been approved.

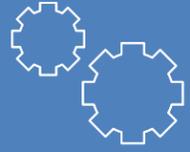
### EXISTING ACCOUNT USERS

Send an email to [cls@sba.gov](mailto:cls@sba.gov) with subject “PRODUCTION Authorizing Official Approval Request” OR “TEST Authorizing Official Approval Request”. In the email state that you are requesting to be an authorizing official for your location id (include the location id in the email).

You will receive an email from [cls@sba.gov](mailto:cls@sba.gov) that your account has been approved.

### CAFS IS THE TECHNOLOGY SOLUTION FOR

- 7(A) LOANS
- 504 LOANS
- COMMUNITY ADVANTAGE
- DISASTER LOANS
- LINC
- MICRO LOANS
- SURETY BONDS



### SETTING UP AN AGREEMENT

Contact your district office. To find the nearest district office use <https://www.sba.gov/tools/local-assistance/districtoffices>



### ASSISTANCE WITH A LOAN APPLICATION

- [CAFS@SBA.gov](mailto:CAFS@SBA.gov) for ETRAN applications
- [SBA.One@bnymellon.com](mailto:SBA.One@bnymellon.com) for SBA One applications



### WEBSITES

PRODUCTION:  
<https://caweb.sba.gov>

TEST:  
<https://catweb2.sba.gov>