

Capital Access Financial Systems (CAFS)

Partner Instructions *new account*

CAFS is accessed via the production URL at <https://caweb.sba.gov> and the test URL at <https://catweb2.sba.gov>. If you have questions, contact CAFS@SBA.gov. The instructions below explain how to create a CAFS Login System (CLS) account. These instructions only apply to a new user enrolling into CLS who does not want to be set up as an Authorizing Official (AO). If you would like to be an AO, please follow the instructions labelled “CAFS AO”.

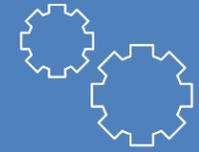
Prerequisite(s): Lender or LSP agreement and HQ location id.

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
 - ii. Enter the Location Id as the “Customer Location”. The location id is on the SBA agreement.
 - iii. Select “Authorizing Official” under “Job Classification”
 - b. Under “Supervisor Information”, select an AO from the drop down.
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.
5. After the AO and OCA IT Security have approved the request, you will receive an email from cls@sba.gov that your account has been approved.

These instructions only assist you to create a CLS account. To access the CAFS systems (ETRAN, SBA One, MPERS, SBG, CLCS, PIMS & GPTS), follow the instructions labelled “**CAFS Roles**”. To access LINC, follow the instructions labelled “**LINC LENDER**”.

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 for ETRAN applications
- SBA.One@bnymellon.com for SBA One applications



WEBSITES

PRODUCTION:

<https://caweb.sba.gov>

TEST:

<https://catweb2.sba.gov>