

Capital Access Financial Systems (CAFS)

Partner Instructions approving users

CAFS is accessed via the production URL at <https://caweb.sba.gov>. If you have questions, contact CLS@SBA.gov. These instructions detail how the AO approves new accounts and roles as well as recertifies accounts. **Prerequisite(s): Authorizing Official Account.**

APPROVING NEW ACCOUNTS (AUTHENTICATION)

1. Go to the production.
2. Log into the system.
3. Select "Admin" on the navigation bar and navigate to Security -> Pending Access Requests (Menu on Left Side of Screen) -> Authentication.
4. Find the records you need to decision. Select the appropriate checkbox (Approve/Decline) for each record.
5. Select Submit.

NOTE – When a new account is created with you as an AO, or when an existing account adds you as their AO, that account will be temporarily suspended until you authenticate as described above.

APPROVING ROLES (AUTHORIZATION)

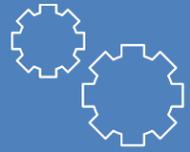
1. Go to the production.
2. Log into the system.
3. Select "Admin" on the navigation bar and navigate to Security -> Pending Access Requests (using the menu on the left side of the screen) -> Level I Authorization.
4. Find the records you need to decision. Select the appropriate radio button (Approve/Decline) for each record.
5. Select Submit.
6. All Level I approved requests will then be automatically forwarded to the appropriate Program Office and OCA IT Security for further review and final approval. The approval process can take up to 5 business days.

BI-ANNUAL ACCOUNT RECERTIFICATION

1. Twice a year, you will receive an email to review the access rights and role permissions associated with each user that you approved as the AO. Click on the link in the email.
2. Log into the system.
3. Select "Admin" on the navigation bar and navigate to Security -> Recertification Decision.
4. Find the records you need to decision. Select the appropriate radio button (Approve/Decline) for each record.
5. Select Submit.

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

- OPSM@sba.gov for ETRAN applications
- SBA.One@bnymellon.com for SBA One applications



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