

Capital Access Financial Systems (CAFS)

AO Instructions [account certification](#)

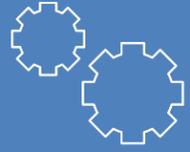
If you have questions, contact CLS@SBA.gov. These instructions detail how the AO recertifies accounts.

BI-ANNUAL ACCOUNT CERTIFICATION

1. Twice a year, supervisors/CORS/authorizing officials will receive an email to review the access rights and role permissions associated with each user that you approved as the AO.
2. Log into the system.
3. Select “Admin” on the navigation bar and navigate to Security -> Recertification Decision.
4. For each account holder managed by the AO, review the roles under the account holder.
 - a. To deactivate an account, remove the check mark next to the name of the account holder.
 - b. To remove access, remove the check mark next to roles that are under the account holder.
 - c. If an account is valid and all roles are approved, do not select/deselect any items associated with the account holder.
5. After all accounts have been reviewed, select Submit.
6. The AO will receive a message to confirm the submission. Once Submit is selected, all actions are final and immediate.

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>

TEST:

<https://catweb2.sba.gov>