



U.S. Small Business  
Administration



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**Capital Access Financial System (CAFS)**

**SBA Authorizing Official (AO)  
Instructions to Approve New  
Users**

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# Description and purpose of the Capital Access Financial System (CAFS) Account

## Overview

The **Capital Access Login System (CLS)** supports account creation for CAFS. A CAFS account and a CLS account are the same; the terms can be used interchangeably.

This presentation provides **step-by-step instructions** for Authorizing Officials (AO) for approving New 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.**

### CAFS IS THE TECHNOLOGY SOLUTION FOR:

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



# Approving Roles

## Instructions

1. Login to CAFS at <https://caweb.sba.gov> (it is necessary for them to login, they do not have a choice. It must be done in CAFS).
2. When prompted, please complete 2 Factor Authentication by requesting a PIN to your email/landline/mobile. If you choose “Skip PIN and Take me to Homepage” you **will not** be able to complete the below steps.
3. Once logged in, hover over the “Admin” tab on the top menu and select "Security System" from the drop list that displays.
4. Once the Security System opens, use the Left-hand navigation links to open Pending Access Requests -> Level I Authorization.
5. Find the Role Request(s) you need to evaluate. Select the appropriate checkbox (Approve/Decline/Withdrawn) for each request.
6. Once you have selected a value for each request that you are authorizing/declining, Select Save. (Note – requests may also be left blank – so you don’t need to complete all requests at the same time).
7. 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. Declined/Withdrawn requests will be removed from the system automatically. Once a decision is made, the user will be notified directly via email.



# **Annual Account Recertification**

## Instructions

1. Once a year, you will receive an email to review the access rights and role permissions associated with each user that has you listed as their AO. Click on the link in the email.
2. Hover over the “Admin” tab on the top menu and select "Security System" from the drop list that displays.
3. Once the Security System opens, use the Left-hand navigation links to open the Recertification Decision.
4. A list of users that have you listed as their supervisor will display. Once expanded, the roles to which the users have permissions will also display and include pre-selected checkboxes for the roles they have. Please note: if there are multiple AOs at your institution, then all AOs must complete recertification for any users underneath them
5. To certify the role, do nothing and leave the role selected/checked. To de-certify the role, remove the checkmark from the checkbox.
6. Save/Submit as indicated on the interface. Once submitted, the system will automatically process the updates made during the recertification process.
7. Any users that are not recertified when the recertification period ends will be deactivated. If needed, their account will need to be reactivated and they will need to re-request their accesses.

## CAFS Support



**Contact the Capital Access Financial System**

**Phone:** 833-572-0502 M-F 8am-8pm EST

**Email:** [cls@SBA.gov](mailto:cls@SBA.gov)