

Capital Access Financial Systems (CAFS)

Partner Instructions Setting up roles

CAFS is accessed via the production URL at <https://caweb.sba.gov>. If you have questions, contact CLS@SBA.gov. The instructions below explain how to add roles to your CLS user id.

Prerequisite(s): CLS Account.

1. Go to the production or test URL.
2. Log into the system.
3. At the top right, select the person icon (see below).



4. Select "Request Access to CAFS Systems".
5. Click on the folder, select the box, and enter the location id for each required access level. (NOTE: LSPs should enter lender location ids).
6. You will receive an email that the account has been updated. **THIS IS NOT AN APPROVAL FOR ACCESS.**

After the access is approved by the AO (they will have 48 hours from your request), Program Office and the CLS security team, you will receive an email from cls@sba.gov.

Role	Description	Who can select?
Read 7a Connect reports	Provides lenders portfolio information.	7a Lenders
Code Tables	Allows the view of descriptions for Codes used in the various CAFS Systems	Partners
Enter/Edit your SBA Loan Applications	Allows Lenders to enter and edit SBA Loan Applications	Lenders
View your SBA Loan Applications	Allows Lenders to View their SBA Loan Applications	Lenders
Update your SBA Loans	Allows Lenders to Update their SBA Loans	Lenders

CAFS IS THE TECHNOLOGY SOLUTION FOR

7(A) LOANS

504 LOANS

COMMUNITY

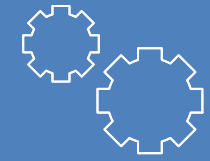
ADVANTAGE

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

- CLS@sba.gov for account set up
- OPSM@SBA.gov for policy/loan applications
- SBA.One@bnymellon.com for SBA One applications



WEBSITES

PRODUCTION:

<https://caweb.sba.gov>

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Role	Privilege - Description	Who can select?
View your SBA Loans	Allows Lenders to View their SBA Loans	Lenders
Enter/Edit Your Intermediary Lender Loans	Allows Intermediary Lenders to Enter their ILP Loans	ILP Lenders
Submit MicroLoan Electronic Reports	Allows MicroLenders to Submit Reports on their Microloans	Microlenders
Submit Application for Loan to Microlender	Allows Lender to submit an application to become a Microlender	Microlenders
Update your partner information (Regulated Lenders)	Allows Lenders to update their Information	Lenders
View partner information	Allows Lenders to view their partner information	Lenders
Loan Officer	Allows Lenders to view the application details and documents of loans originated in SBA One	7a Lenders
Loan Processor	Create or Edit Lender's Loans in SBA One - Allows Lenders to create or edit loan applications using SBA One	7a Lenders
Underwriter	Allows the user to edit loans in SBA One	7a Lenders
Submit to E-Tran	Allows users to directly submit an application to the E-tran system.	7a Lenders
View PARRIS	View PARRIS Lender Scorecard information - Allows Lenders to view their PARRIS scorecard information in SBA Once	7a Lenders
PSB Partner	Allows to enter/update the Preferred Surety Bond application	PSB Partner User
SBG Agent	SBG Agent (Create/submit Contractor's bond application to SBA)	Bonding Agency User
SBG Partner	Allows to view their Bond application	Surety User
SBG Claims Partner	Allows to enter/submit their Claim / Recovery requests to SBA	Claims User

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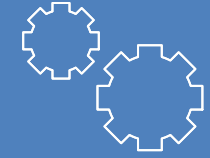
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