

## SETTING UP NEW ACCOUNT USERS THAT ARE NOT THE AUTHORIZING OFFICIAL

1. Go to <https://caweb.sba.gov>
2. On the left side of the page under “SBA Account Login”, select “Not Enrolled”.
3. Complete all sections in the profile.
  - \*You select your own user ID
  - \*Phone number requires a country code use 1
  - \* CAFS has a two-step authentication process that will send a code either via email or text. If you want these via text, make sure you enter a mobile number.
  - a. Under User Information
    - i. Select “Partner” for user type
    - ii. Enter the Location Id as the “Customer Location”.
    - 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. Email the authorizing official at your institution directly and ask them to log into CAFS and approve your access
6. After the AO and OCA IT Security (SBA) have approved the request, you will receive an email from [cls@sba.gov](mailto:cls@sba.gov) that your account has been approved.

### ONCE ACCOUNT IS APPROVED

1. Go to <https://caweb.sba.gov>
2. Log into the system.
3. At the top right, select the person icon (see below).  

4. Select “Request Access to CAFS Systems”.
5. See below for the folders you will need. Click on the folder, select the box, and enter the location id for each required access level.
  - a. Click on the folder  Electronic Lending - Origination (ETLAN)
    - Enter/Edit your SBA Loan Applications
    - View your SBA Loan Applications
  - b. Click on the folder  Electronic Lending - Servicing (ETLAN)
    - Update your Lender's SBA Loans
    - View your SBA Loans
6. At the bottom of the page hit Submit
7. You will receive an email that the account has been updated. THIS IS NOT AN APPROVAL FOR ACCESS.
8. Email the authorizing official at your institution directly and ask them to log into CAFS and approve your 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](mailto:cls@sba.gov).