SIGNING UP TO BE AN AUTHORIZING OFFICIAL

Accounts require each user account to have an institutional level Authorizing Official (AO) from their location linked to their profile in the CLS system. The AO acts as an over-seer for CLS related issues and is the first decision level for partner user account and role requests for the partner. AOs also are responsible for recertifying (verifying users and role permissions) the accounts bi-annually.

NEW ACCOUNT USERS

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.
a. Under User Information
i. Select "Partner" for user type

i. Enter the Location Id as the "Customer Location". The location id is on the SBA agreement.

ii. Select "Authorizing Official" under "Job Classification"

b. Under "Supervisor Information"
i. Enter your email address, first name, and last name.

ii. Send an email to cls@sba.gov with subject "PRODUCTION Authorizing Official Approval Request" In the email, state that you are requesting to be an authorizing official for your location id
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.

You will receive an email from cls@sba.gov that your account has been approved.

EXISITNG ACCOUNT USERS

Send an email to cls@sba.gov with subject "PRODUCTION Authorizing Official Approval Request" In the email state that you are requesting to be an authorizing official for your location id (include the location id in the email).

You will receive an email from 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 (ETRAN)

☑ Enter/Edit your SBA Loan Applications

☑ View your SBA Loan Applications

b. Click on the folder 📁 Electronic Lending - Servicing (ETRAN)

☑ 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. Select Admin and approve your roles. See instructions below regarding approving users.
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.

AS THE AUTHORIZING OFFICIAL YOU ALSO HAVE TO DO THE FOLLOWING FOR THE USERS IN YOUR BANK

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.