Capital Access Financial Systems (CAFS)

Partner Instructions *customer support*

CONTACT FLOW

Need Help?

Lender Agreements	Contact	https://www.sba.gov/tools/local-assistance/districtoffices
LSP Agreements	Email	LSPagreements@sba.gov
Account Set Up	Issues with: • *Setting up Authorizing Official* • *Setting up account/roles* • *Resetting password* • *Changing Institutions* • *Deleting accounts* Email	**Primary:** cls@sba.gov **Secondary**: Sheri McConville, Sheri.Mcconville@sba.gov
ETRAN Loan Processing	Issues with: • *Loan Structure- EPCOC; Sole proprietorship* • *Mandatory Ownership* • *Incorrect Names* • *Credit Scoring* • *Transmissions Issues* • *Vendor Communications* Call/Email	**Primary:** Hardy Slay Hardy.Slay@sba.gov Ryan Gerald Ryan.Gerald@sba.gov (202) 205-6554 **Secondary**: Glenn Hannon Glenn.Hannon@sba.gov (202) 205-7122
Lender Portal	Email	Lender.Portal@sba.gov
Report Security Incidents/Data Quality Issues	Email	cls@sba.gov
SBA One Processing	Call/Email	**Primary:** SBA.One@bnymellon.com OR 877-245-6159, Call option 5 **Secondary**: Joshua Dykema joshua.dykema@sba.gov
COMPLEX/ INTRICATE	Issues with: • *Policy Interpretation* • *Escalations from any of above* • *Center/District Issues* • *Training Requests* • *Adding a Franchise/FRUNS Number* Call/Email	**Primary:** Glenn Hannon Glenn.Hannon@sba.gov (202) 205-7122 **Secondary**: Ryan Gerald Ryan.Gerald@sba.gov (202) 205-6554

SETTING UP AN AGREEMENT

Contact your district office. To find the nearest district office use https://www.sba.gov/tools/local-assistance/districtoffices

ASSISTANCE

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

WEBSITES

PRODUCTION:
https://caweb.sba.gov

TEST:
https://catweb2.sba.gov.

SBA
U.S. Small Business Administration