Capital Access Login System (CLS) Instructions

SBA Banking Partners
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The Capital Access Login System (CLS) controls access to Small Business Administration (SBA), Office of Capital Access (OCA) applications. This document provides instructions for SBA Lending Partners on how to use CLS.

So, what’s covered in this document?

- How to access OCA applications by creating a user profile
- How to get a User ID and Password
- How to request to be the first Authorizing Official for your institution
- How to update your profile information

If you are an SBA Employee or SBA Contractor, refer to the instructions for your relationship.
Welcome Screen

- Please read the CLS disclaimer
- Click “I agree to these terms” radio button, to accept the terms of use
- Otherwise, click “I do not agree” to reject the terms of use.
The CLS Account Login screen. The URL is [https://caweb.sba.gov/cls](https://caweb.sba.gov/cls)
Request User ID

- Complete the data entry fields in the screen below
- Define your own User ID and Password.
- Once submitted an email will be sent to you to verify your email address and activate your account.

User ID must be at least 8 characters
May also be any 4 digits the user can remember
Click on lookup Zip to populate City and State
Select your job title: Authorizing Official, LINC Contact or Other
Enter your Partner Headquarters ID as found in the PIMS (Accuity) system.
Dear Jane Doe,

Your account had been created in the SBA's Capital Access Login System (CLS) at http://caweb.sba.gov/cls.

Please click on the link below to verify your email address:

Verify Your Email

For additional help please contact your Program Office representative at the U.S. Small Business Administration.
Email Authorizing Official

• Email will be sent to Authorizing Official at your lending institution to approve your request for a CLS Account with SBA.

Dear Joe Smith,
A new CLS account for Jane Doe26 had been created in the SBA's Capital Access Login System (CLS).
Please go to CLS login and approve/decline User's account.

Below are the steps to approve/decline new account requests and profile updates:
· Login to Capital Access Login System (CLS) at https://caweb.sba.gov/cls/dsp_login.cfm
· Click on Security System on Choose Function screen.
· From the left hand menu, click on Authentication link under Pending Access Requests folder icon.
· Upon performing decision, an automated email will be sent to the user.

SBA CLS Staff
Sign Up to be the First Authorizing Official for your Institution

- At the time of account creation, you can sign up to be an Authorizing Official for your institution. In addition to the Request User ID actions, the user should do the following before submitting.
- Once the request is submitted, the user should send an email requesting First Authorizing Official access to cls@sba.gov.

![Image showing login and contact information fields with instructions to leave the Supervisor Information fields blank and select Authorizing Official.](image-url)
Sign Up For LINC

- At the time of account creation, you can sign up to be a LINC Contact
Choose LINC Areas Of Interest

If you have indicated that you are a LINC Contact, after you verify your email address, you will be presented with a screen to choose your area’s of interest.
Choose LINC Areas Of Interest

Choose the counties for each state where you are interested in receiving LINC request.

- Use check box to select counties
- Click Done when finished

Selecting a State will popup a window with all the Counties in that State. You can use the Select All button to check all Counties. Or select individual Counties. The Done button will return you to the list of states.

When you have added all the States and Counties you need. Press the Save Changes button. When the system has finished processing the items an Alert will tell you that the page can be safely closed.
Choose LINC Areas of Interest

Be sure to save your changes

Click to Save Changes
Use your User ID and Password to sign on to the system

Enter User ID

Enter Password

Click on Login

Enter CLS User ID and Password

Click on Login

Text Only
To edit your profile, click on the Profile button. Update any information in your profile.

### Identity Information

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Jane</td>
</tr>
<tr>
<td>First Name</td>
<td>Doe</td>
</tr>
<tr>
<td>Middle Name</td>
<td></td>
</tr>
<tr>
<td>Last Name</td>
<td></td>
</tr>
</tbody>
</table>

### Contact Information

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Country</td>
<td>UNITED STATES</td>
</tr>
<tr>
<td>Zip+4</td>
<td>22302</td>
</tr>
<tr>
<td>Street 1</td>
<td>14 King St</td>
</tr>
<tr>
<td>City/State</td>
<td>ALEXANDRIA</td>
</tr>
<tr>
<td>State</td>
<td>VA</td>
</tr>
<tr>
<td>Phone Number</td>
<td>1-202-401-4281</td>
</tr>
<tr>
<td>Email Address</td>
<td><a href="mailto:sherliandler@bank.com">sherliandler@bank.com</a></td>
</tr>
</tbody>
</table>

### Information Currently Associated with Profile

- Default Location Id: 9551
To request access to OCA Applications click on the ‘Access’ button at the top of the CLS screen.

Access to applications is subject to the approval of your organization authorizing official, and the SBA Office of Capital Access.
Request Application Access

- You will see a list of available applications. Click on the file folder of any application, and request whatever role(s) you need.
- For those requiring SBA approval, you will see a pop-up message. Click OK to clear the message. If you select multiple roles, you will see and need to clear the pop-up message for each role.
Entering Location ID

- If requesting access to known Location IDs, type each one in.
- After submitting the request, you will return to the Choose Function page.
Use the Look Up function to find an unknown Location ID

- Search on Location ID or FIRS Number to find a unique ID.
- Search on Partner ID to find multiple locations of a unique partner.
- Search on Partner Name, Type, City, or State to find multiple locations and partners.
Once a Lender Authorizing Official has approved access, users will receive an email notification from SBA CAFS Security (cls@sba.gov) that access was approved.

From: CLS@sba.gov (mailto:CLS@sba.gov)
Sent: Friday, May 15, 2015 2:14 PM
To: jane.doe@bank.com
Subject: Prod - User Account Request Decision

Dear Jane Doe,
Your request for access has been approved by your Lender Authorizing Official.

If Program Office approval is required, users will receive an e-mail notification from SBA CAFS Security (cls@sba.gov) that the request for approval has been sent to the appropriate SBA Program Office. This approval process may take 1 to 3 business days.
Once Program Office approval is completed, users will receive an e-mail notification from SBA CAFS Security (cls@sba.gov) that approval was granted and as confirmation that their CLS profile has been updated.

Dear Jane Doe,

Your SBA CAFS Security profile has been successfully updated.
A determination on your request to access the following CAFS Web Systems with the role permissions you requested are provided below:

* Web System Etran Origination with the permission role of PartnerUpdate access has been granted.

The system you have request access to is a Federal computer system and is the property of the United States Government. It is for authorized use only. Unauthorized use of SBA CAFS Web systems or use that exceeds the users authorized access privileges is prohibited and may constitute a violation of 18 U.S.C. - 1030 or other Federal laws and regulations and may result in criminal, civil, and/or administrative action.

This determination DOES NOT constitute "Participation In" or "Approval Of" any Web Application Forms/Transactions that you will submit to OCA via the web applications that you have been granted access to.

Thank You,
SBA CAFS Security CLS Staff
After logging in, you will see the following screen with all applications you can access.

- **7A Connect** - Access only for SBA 7a Lenders and SBA Employees
- **CDC Management Reports**
- **Code Tables**

**Capital Access Login System - Choose Function**

- **Currently Available Applications**
  - Electronic Lending - Origination (ETRAN)
  - Electronic Lending - Servicing (ETRAN)
  - SBA One
• You must change your password to one only you know.
• Your password must be complex and in compliance with SBA’s password policy.
• It must be a minimum of 8 characters long and contain three of the following four properties:
  – Upper Case Letters A, B,C, .....Z
  – Lower Case Letters a,b,c,.....z
  – Numbers 0,1,2,.....9
  – Special characters {}[]<>;?`!@$%^&*-_+=
• Passwords expire every 90 days. Starting 15 days prior to the expiration date, you will be given a reminder to change the password. After 90 days you will be required to change it.
Once approved as the Authorizing Official, the user will have the ability to perform the following functions.

- **Account Authentication** – The ability to approve account requests for users who have selected them as an Authorizing Official.

- **Role Authorization** – The ability to approve Role Requests for all employees that fall under their supervisory umbrella. Once approved, the request will be forwarded to the appropriate Program Office and then IT Security for final approval.