

Capital Access Login System (CLS) Instructions

SBA Employees and SBA Contractors



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Overview

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 Employees and SBA Contractors 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 update your profile information
- How to change office codes

If you are a Small Business Borrower or Banking Partner, 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.

 Capital
Access Login
System

Print Help

May 20, 2015

Expand Collapse

CLS

- Help
 - Forgot User ID?
 - Forgot or Expired Pa
- Instructions for
 - Banking Partners
 - Small Businesses
 - SBA Employees and
- New Users
 - Create New SBA CLS
 - Contact Program Off

You are accessing a U S Government information system, which includes (1) this computer, (2) this computer network, (3) all computers connected to this network, and (4) all devices and storage media attached to this network or to a computer on this network. This information system is provided for U.S. Government-authorized use only.

Unauthorized or improper use of this system may result in disciplinary action, as well as civil and criminal penalties.

By using this information system, you understand and consent to the following:

- You have no reasonable expectation of privacy regarding any communications or data transiting or stored on this information system. At any time, the government may for any lawful government purpose monitor, intercept, search and seize any communication or data transiting or stored on this information system.
- Any communications or data transiting or stored on this information system may be disclosed or used for any lawful government purpose.
- Your consent is final and irrevocable. You may not rely on any statements or informal policies purporting to provide you with any expectation of privacy regarding communications on this system, whether oral or written, by your supervisor or any other official, except SBA's Chief Information Officer.

☐ I do not agree. ☒ I agree to these terms.

CLS Account Login

The CLS Account Login screen. The URL is <https://caweb.sba.gov/cls>

The screenshot displays the SBA Capital Access Login System (CLS) interface. At the top, the SBA logo is on the left, followed by the text "Capital Access Login System" and "Print Help" buttons. A date stamp "May 20, 2015" is centered. On the right, a "Ready" status indicator is visible. A left-hand navigation menu contains links for "Expand", "Collapse", "CLS", "Help" (with sub-links for "Forgot User ID?" and "Forgot or Expired Pa"), "Instructions for" (with sub-links for "Banking Partners", "Small Businesses", and "SBA Employees and"), and "New Users" (with sub-links for "Create New SBA CLS" and "Contact Program Off"). The main content area features a "SBA Account Login" form with fields for "* User ID" and "* Password", and "Login" and "Reset" buttons. A "Text Only" link is positioned below the form.

SBA Capital Access Login System [Print](#) [Help](#) Ready

May 20, 2015

[Expand](#) | [Collapse](#)

- CLS
 - Help
 - [Forgot User ID?](#)
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 - Instructions for
 - [Banking Partners](#)
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 - New Users
 - [Create New SBA CLS](#)
 - [Contact Program Off](#)

SBA Account Login

* User ID

* Password

[Text Only](#)

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.

The screenshot shows the SBA Capital Access Login System registration form. The form is divided into several sections: Login Information, Contact Information, User Information, and SBA Employee Supervisor Information. Callouts provide additional instructions for each section.

Login Information

- User ID:** Must be at least 8 characters. May also be any 4 digits the user can remember.
- Password:** Must be at least 8 characters. (Link: [SBA Password Rules](#))
- Re-enter Password:**

Contact Information

- Country:** UNITED STATES
- Zip +4:** (Link: [Lookup Zip](#))
- Street 1:**
- Street 2:**
- City:**
- Phone Number:** (Country) (Area Code) (Phone Number) (Extension) (US is 1) (999-9999)
- E-Mail Address:**
- Re-enter E-Mail:**

User Information

- User Type:** SBA Employee
- Select Job Title:** Supervisor

SBA Employee Supervisor Information

- Supervisor's Email:**
- OR**
- Supervisor's First Name:**
- Supervisor's Last Name:** (Link: [Lookup Supervisor by Email or First Name/Last Name](#))
- Choose Supervisor:** Lookup not done yet. Results will appear here.

Security: Please enter text shown in the image: 9 6 1 6

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: Contracting Officer, Supervisor or Other

Enter your supervisor's email address or First/Last Name to lookup

New account request verification Email

From: CLS@sba.gov [<mailto:CLS@sba.gov>]

Sent: Tuesday, May 19, 2015 4:35 PM

To: Doe, Jane

Subject: Prod - New account request verification

Dear Jane Doe,

Your account had been created in the SBA's Capital Access Login System (CLS) at <https://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 to Supervisor

Email will be sent to your supervisor or contracting officer to approve your request for a CLS Account with SBA.

From: cls@sba.gov [<mailto:cls@sba.gov>]

Sent: Thursday, May 21, 2015 1:10 PM

To: Jim Smith

Subject: Prod- New account completion request

Dear Jim 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.

CLS Login

Use your User ID and Password to sign on to the system

The screenshot displays the SBA Capital Access Login System interface. The top navigation bar includes the SBA logo, the text "Capital Access Login System", and links for "Print" and "Help". The date "May 20, 2015" is shown in the center of the bar. On the right, a "Ready" status indicator is visible. A left-hand sidebar contains a tree view with categories: "CLS", "Help" (with links for "Forgot User ID?" and "Forgot or Expired Pa"), "Instructions for" (with links for "Banking Partners", "Small Businesses", and "SBA Employees and"), and "New Users" (with links for "Create New SBA CLS" and "Contact Program Off"). The main content area features the "SBA Account Login" form. This form includes fields for "* User ID" and "* Password", each with a blue callout bubble pointing to it that says "Enter CLS User ID and Password". Below the fields are "Login" and "Reset" buttons. A blue callout bubble points to the "Login" button with the text "Click on Login". A "Text Only" link is located below the buttons.

Expand | Collapse

- CLS
 - Help
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May 20, 2015

Ready

SBA Account Login

* User ID

* Password

Login Reset


[Text Only](#)

Enter CLS User ID and Password

Click on Login

Update Profile

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



Capital
Access Login
System

Exit Help
Profile Access Choose Function Change Password

Welcome Jame George. Office 0353: WASHINGTON DISTRICT OFFICE

Identity Information

* Name:

* (First)

(Middle)

* (Last)

(Suffix - Jr, Sr, I, II, etc)

Contact Information

* Country:

* Zip+4:

Street 1:

Street 2:

* City/State:

* Phone Number:

* (Country)

* (Area Code)

* (Phone Number)

(Extension)

(US is 1)

(999-9999)

* E-Mail Address:

* Re-enter E-Mail:

SBA Employee Information

Default Office Code:

Federal Agency Information

* Select Agency :

* Select Job Title :

Request Application Access

- 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.

The screenshot shows the SBA Capital Access Login System interface. At the top, there is a navigation bar with links: **SBA**, **Capital Access Login System**, **Exit**, **Help**, **Profile**, **Access**, **Choose Function**, and **Change Password**. Below the navigation bar, a welcome message reads: "Welcome Jame George. Office 0353: WASHINGTON DISTRICT OFFICE".

The main content area displays a list of applications under the heading "Electronic Lending - Origination (ETRA)". The first application is "Assign Review of Loan Applications (Show/Hide)". It has a sub-section "Office Code" with a text box containing "0353" and a "Del: ☐ Lookup" button. Below this, there is a list of roles with checkboxes: ☒ Enter/Edit Loan Applications (Show/Hide), ☒ 504, ALP & PCLP, ☐ Disaster (Home & Business), ☐ Intermediary Lending Pilot Program, ☐ Micro Loan (Direct & Guaranty), ☐ Regular 7a, ☐ Manage Review of Loan Applications (Show/Hide), ☐ Return an e-mail to CDC, ☐ Review Loan Applications (Show/Hide), ☐ Update Configuration Parameters in Loan Origination System, and ☐ View Loan Applications.

Below the first application, there is another application "Electronic Lending - Servicing (ETRA)". It has a sub-section "Office Code" with a text box containing "0353" and a "Del: ☐ Lookup" button. Below this, there is a list of roles with checkboxes: ☐ Update Configuration Parameters in Loan Origination System, ☒ Update Loan & Guaranty Portfolio Servicing, ☒ 504, ALP & PCLP, ☐ Cancel Loans Only, ☐ Create Notes Receivable, ☐ Create SBIC Commitments, ☐ Create SBIC Drawdowns, ☐ Create SBIC Notes, ☐ Denver CFO only update, ☐ Disaster (Home & Business), ☐ Generate Loan Authorization Documents(LADS), ☐ Manage Licensees, ☐ Micro Loan (Direct & Guaranty), ☐ Perform Liquidation and License transfer, ☐ Perform Purchase Actions, ☐ Perform disbursements on direct and disaster loans, ☐ Regular 7a, ☐ Take decisions on pending tasks, ☐ Update SBIC Portfolio and Licensee Information, and ☒ View Loan & Guaranty Portfolio Servicing.

A pop-up message box titled "Message from webpage" is displayed in the center. It contains a question mark icon and the text: "You are requesting access to a Federal System. Once you click Submit at the bottom of this page, your request will go to the appropriate SBA offices for approval. You will later get an email, usually within 1-3 business days, telling you whether the access has been granted or not." At the bottom of the pop-up are "OK" and "Cancel" buttons.

Check the box
for the role

Click OK

Application Access Approval Process

- Once your Supervisor or Contracting Officer 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 Supervisor.

- 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.

Application Access Approval Process

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 OrigGov 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

Application Access

After logging in, you will see the following screen with all applications you can access.



Capital
Access Login
System

[Exit](#) [Help](#)
[Profile](#) [Access](#) [Choose Function](#) [Change Password](#)

Ready

Welcome Jame George. Office 0353: WASHINGTON DISTRICT OFFICE

Capital Access Login System - Choose Function

Currently Available Applications

■ Centralized Loan Chron System (CLCS)	■ Field Cashiering System (FCS)
■ Developer Utilities	■ General Ledger Only (GLO)
■ Electronic Lending - Origination (ETRAN)	■ Guarantee Purchase Tracking System (GPTS)
■ Electronic Lending - Servicing (ETRAN)	■ Loan Accounting Online Reports System (LAORS)
■ Electronic Lending - Post Servicing (ETRAN)	■ Loan/Borrower Search

Change Password

- 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.

The screenshot shows the 'Change Password' page of the SBA Capital Access Login System. The header includes the SBA logo and navigation links: 'Exit', 'Help', 'Profile', 'Access', and 'Choose Function'. The main content area is titled 'Change Password' and contains two input fields: 'New Password:' and 'Retype New Password:'. Below these fields are two buttons: 'Change Password' and 'Continue (Without Changing Password)'.

SBA Capital Access Login System

Exit Help Profile Access Choose Function

Change Password

Change Password

New Password:

Retype New Password:

Change Password

Continue (Without Changing Password)