



2023 CAFS Recertification Instructions

Once a year, SBA Supervisors/CORS/Authorizing Officials (AOs) will receive an email to review the access rights and role permissions associated with each user that was approved by the AO. The steps for this process are outlined below:

1. Log into the system - <https://caweb.sba.gov/cls>
2. Select Admin on the navigation bar and navigate to Security System -> Recertification Decision
3. For each account holder managed by you, below are the available options:
 - To certify an account and approve all roles, select the "Certify" radio button next to the account holder
 - To certify an account, but remove access to specific roles:
 - First select the "Certify" radio button next to the account name as above
 - Then select the radio button "Decertify" next to the roles which you wish to remove for that user
 - To deactivate an account, select the radio button "Decertify" next to the name of the account holder
4. After all accounts have been reviewed, click the "**Submit**" button
5. You will see a confirmation screen with all the users and roles you have selected to be certified (and/or decertified).
 - If something is incorrect you may click the "Cancel" button on the confirmation page to go back to the previous screen and make changes as needed.
 - **If you are satisfied, you can click the "Submit" button to process the certification decision for the selected users. Once the "Submit" button is pressed on the confirmation page, all certification decisions are final and immediate.**

Note:

- i. The AO does NOT have to certify/decertify all accounts at the same time. If they are unsure, they may leave the "No action" radio button selected to defer the process to a later time
- ii. Keep in mind that if the AO does not finish certifying accounts by the end of the recertification period, all accounts for which a decision has not been made will be decertified and deactivated

Office of Capital Access

U.S. Small Business Administration

If you have any questions,

please call 1-833-572-0502 M-F 8 am - 8 pm

or email cls@sba.gov