



# Researching Loan Data

Updated: 5/14/2020

# Step 1: Log into CLS

Login to CLS at <https://caweb.sba.gov/cls>

**SBA Account Login**

Web Enabled?  
Forgot Password?  
Forgot Username?

User ID:

Password:

Remember Me

By using this information system, you consent and agree to the following:  
You have to be a registered user of this system. If you are not a registered user, you must contact the system administrator for more information. This information system is provided for the use of the system administrator only. It is not to be used for any other purpose.  
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I agree to these terms.

Login

**Program Information**

Feb 23, 2018  
Fiscal 2019 and 2020  
Download the latest SBA 1302 form. Download the latest SBA 1302 form.

Mar 1, 2018  
SBA's new process for managing risk and rural lending activity

**News**

**Congressional Reports**  
Activity by Congressional District Report

**CAPS Requirements**  
JavaScript should be enabled. Add this site to your PopUp exception list of sites.  
The following browsers are supported: Chrome Version 80+, Firefox Version 72+, Edge Version 18+

**SBA Today**

**Portfolio Size & Dollars (in Billions)**

Instrument	Value
5,099,413 Instruments for	171

**Financial Instruments Funded FY 2020**

Instrument	Value
FISB Bid Bonds	1359
FISB Final Bonds	453
Guaranteed Bid Bonds	3378
Guaranteed Final Bonds	1129
TIA Loans	440894
SBA Debentures	4322
Disaster Loans	129787
Loans to Microbusiness	3208
Loans to Mainstream	46
SBC Commitments	90

**Current Interest Rates**

Instrument	Rate
5-yr Constant Maturity Treasury	0.275%
SBA Note Rate for 10 years	2.94746%
SBA Note Rate for 20 years	2.96978%
SBA Note Rate for 25 years	2.96978%
LIBOR	3.2%
SBA Fixed Base Rate	9.25%
SBA Pkg Rate	1.85%
Wall Street Journal Prime Rate	3.25%

# Step 2: Navigate to Servicing from Dashboard

Select Electronic Lending – Servicing (ETRAN) from the Loans Menu

The screenshot displays the SBA Capital Access Financial System dashboard. The top navigation bar includes 'Accounting', 'Admin', 'Borrower', 'General', 'Loans', and 'Micro'. The 'Loans' menu is expanded, showing a list of options: '7A Connect - Access only for SBA 7a Lenders and SBA Employees', 'CDC Online', 'Centralized Loan Chron System (CLCS)', 'Electronic Lending - Origination (ETRAN)', 'Electronic Lending - Servicing (ETRAN)', 'Electronic Lending - Post Servicing (ETRAN)', 'Guarantee Purchase Tracking System (GPTS)', 'Loan Associated Names and Addresses (LAN)', and 'SBA One'. A red arrow points to the 'Electronic Lending - Servicing (ETRAN)' option, which is also highlighted with a red box. A yellow circle highlights the entire 'Loans' menu area. The dashboard also features a 'Capital Access Dashboard' with a welcome message for Ryan Gerald, an 'Account at a Glance' section, and a 'News' section with a headline about SBA's new process for measuring urban and rural lending activity.

# Step 3: Search for Loans

1. Select "Search" button from top menu bar.
2. Select "Research" from Status Drop-down.
3. Then click "Submit"

Step 1.

Step 3.

Step 2.



E-Lend  
Servicing

Report Search Lender Receivables  
Global E-Trans Loans Acceleration Prepayment SBA Only

Reset Clear Submit Display 150 loans/page, ● most recent first ○ oldest first  Show SQL (OCA only)

<b>Loan:</b> SBA Loan Number: <input type="text"/> SBA App Number: <input type="text"/>	<b>Financial Instrument Type:</b> (+/-) 504 Commitment	<b>Address Associated:</b> Type of Address: <input type="text"/> Loan Mailing Address <input type="text"/>
<b>Where and When:</b> Lender Location ID: <input type="text"/> MicroLender ID: <input type="text"/> SBIC License Number: <input type="text"/> SBA Office Code: <input type="text"/> Funding date begins: <input type="text"/> Funding date ends: <input type="text"/>	<b>Program Code:</b> Not Selected Yet	Partial Street Address (Contains): <input type="text"/> Partial Zip Code: <input type="text"/> Partial City Name: <input type="text"/> State: <input type="text"/>
	<b>Processing Method:</b> (+/-) 3 Percent Preferred Stock Small Busin 4 Percent Preferred Stock Small Busin	<b>Business Associated:</b> EIN/SSN: <input type="text"/> Partial Name: <input type="text"/>
	<b>Purchase Indicator:</b> Guaranty Purchased, Lender Serviced Guaranty Purchased, SBA Serviced	<b>Person Associated:</b> SSN: <input type="text"/> Partial First Name: <input type="text"/> Partial Last Name: <input type="text"/>
	<b>Special Purpose Code:</b> (+/-) (7a) (19) Small Certified Loans 2 Percent Preferred Stock - SBIC	<b>Partial Name Restrictions:</b> Searches by Partial Name must include at least one other search criterion.
	<b>Status:</b> (+/-) Active Un-Dischursed Research	



# Step 4: Select a Loan to research

Click on the App# hotlink to view and update the loans

https://catweb2.sba.gov/elend/servicing/dsp\_search.cfm

SBA catweb2 | E-Lend Servicing | Reports Search Lender Receivables | Global E-Tran SBA Only

Displaying rows 1 - 41 of 41 loans meeting criteria.  
Loan Name, Processing Method, Funded and Status show full text in "tooltip".

Loan Information								Loan Mailing Address Information		
Row	App#	Funded	Loan Number	Loan Name	Processing Method	Loan Amount	Status	Street Name	City	S
	<a href="#">21465</a>	2020-04-03	76289950-03	3D Computer Corp.	Paycheck Protection Progr...	\$250,000.00	Research	2103 Grant Street	Bellingham	
2	<a href="#">21444</a>	2020-04-02	76288950-08	PB Coast, inc.	Paycheck Protection Progr...	\$208,300.00	Research	440 Parker Farm Drive	Wilmington	
3	<a href="#">21439</a>	2020-04-02	76288850-05	3D Computer Corp.	Paycheck Protection Progr...	\$250,000.00	Research	2103 Grant Street	Bellingham	
4	<a href="#">21438</a>	2020-04-02	76288750-02	3D Computer Corp.	Paycheck Protection Progr...	\$250,000.00	Research	2103 Grant Street	Bellingham	
5	<a href="#">21437</a>	2020-04-02	76288650-10	3D Computer Corp.	Paycheck Protection Progr...	\$250,000.00	Research	2103 Grant Street	Bellingham	
6	<a href="#">21433</a>	2020-04-02	76288350-01	3D Computer Corp.	Paycheck Protection Progr...	\$250,000.00	Research	2103 Grant Street	Bellingham	
7	<a href="#">21428</a>	2020-04-02	76287850-10	3D Computer Corp.	Paycheck Protection Progr...	\$250,000.00	Research	2103 Grant Street	Bellingham	
8	<a href="#">21424</a>	2020-04-02	76287650-04	Dalen Enterprises, 55 Inc.	Paycheck Protection Progr...	\$3,200.00	Research	185 S Union Road	MANTECA	
9	<a href="#">21295</a>	2020-04-01	76281450-06	PB Coast, inc.	Paycheck Protection Progr...	\$10,000.00	Research	440 Parker Farm Drive	Wilmington	

Last modified: 06/24/2019 12:00:00 AM | > FirstGov > E-Gov > Regulations.gov > White House | SBA Pr

*Note: data shown above is for example only and is not actual PPP data.*

# Step 5: Update the Loan

Use the left side navigation for loan file research.

GO TO SBA HOME PAGE

Test Business WILMINGTON NC Amount \$200,000 Status Research Loan 76268050-10 App 20981 Funded 03/29/2020

### Paycheck Protection Program

Expand | Collapse

- Test Business's Loan Application
  - Loan Info
  - Use of Proceeds
  - 1502 Info
  - Lender Comments
  - Project Info
  - Repayment
  - UCC Filings
    - History/Add Filing(s)
    - Secured Parties
    - Debtors
  - Borrowers
    - 1. \* Test Business
      - Principals
        - 1. Testy Testers
  - Guarantors

#### Loan Information , Guaranty Loan - READONLY

\* (You may select more than one box)

No special purposes apply

\* Loan Name

Servicing Location ID  Servicing Location Name

SBA Servicing Office

Cohort Code  Legislative Indicator

Underwriting Authority

Bank Info

(Account #) (Routing #) (Account Type) (TIN 99-9999999)

By checking the "I certify" box below, the Lender is agreeing that for each SBA Form 1502 report submitted by Lender to request payment of Paycheck Protection Program (PPP) proceeds, the Lender certifies that all PPP loans included in

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# Need Additional Help?



**For additional assistance, please reach  
out to the CLS Help Desk:**

1.833.572.0502

[CLS@SBA.gov](mailto:CLS@SBA.gov)