



Researching Loan Data

Updated: 5/14/2020

Step 1: Log into CLS

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

The screenshot shows the SBA Capital Access Financial System login page. The page has a blue header with the SBA logo and the text "CAPITAL ACCESS FINANCIAL SYSTEM". The main content area is divided into three columns. The left column contains the "SBA Account Login" form with fields for "User ID" and "Password", and a "Login" button. The middle column features a large image of the U.S. Capitol building. The right column displays "SBA Today" information, including "Portfolio Size & Dollars (in Billions)" and "Financial Instruments Funded FY 2020".

SBA Account Login

Not Remembered? [Forgot Password?](#)
[Forgot Username?](#)

User ID:

Password:

Disclaimer:
This is an external U.S. Government information system, which includes: (1) this computer; (2) the computer network; (3) all computers connected to this network, and (4) all devices and storage media physically attached to this network or to a computer in this network. This information system is governed by U.S. Government information security policy.
Unauthorized or improper use of this system may result in disciplinary action, as well as civil and/or criminal penalties.
By using this information system, you consent and warrant that the following:
You have no expectation of privacy regarding any communications or data transmitted or stored on this information system, at any time, the government has the right to monitor and intercept any communications or data transmitted or stored on this information system.
Any communications or data transmitted or stored on this information system may be disclosed or used for any lawful government purpose.
Your consent to these terms is irrevocable. You may not rely on any statements or information provided 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 those of the Information Officer.

☐ I agree to these terms.

Login

Program Information

Feb 23, 2018
Fiscal Year 2018 and 2019
Download the latest SBA 1028 form. Download the latest SBA 1028 form.

Mar 1, 2018
SBA's new process for measuring urban and rural lending activity

News

Congressional Reports
Activity by Congressional District Report

CARS 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 20+.

SBA Today

Portfolio Size & Dollars (in Billions)

	\$
5,099,412 instruments for	1731

Financial Instruments Funded FY 2020

	#
FISB Bid Bonds	1159
FISB Final Bonds	453
Guaranteed Bid Bonds	3378
Guaranteed Final Bonds	1329
Trial Loans	4408904
304 Debentures	4322
Disaster Loans	126787
Loans to Microbusiness	3208
Loans to Microlenders	40
SBC Commitments	80

Current Interest Rates

	Rate
5-yr Constant Maturity Treasury	0.275%
304 Note Rate for 10 years	2.04746%
304 Note Rate for 20 years	2.06979%
304 Note Rate for 25 years	2.06979%
LIBOR	3.2%
SBA Fixed Base Rate	9.23%
SBA Pkg Rate	1.86%
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 the SBA logo and the title "CAPITAL ACCESS FINANCIAL SYSTEM". Below this, a secondary navigation bar contains tabs for Accounting, Admin, Borrower, General, Loans, and Micro. The Loans tab is selected, and a dropdown menu is visible. A yellow circle highlights the Loans dropdown menu, and a red arrow points to the "Electronic Lending - Servicing (ETRAN)" option, which is also highlighted with a red rectangle. The dashboard includes a "Capital Access Dashboard" section with a welcome message for Ryan Gerald, a "Financial Instruments Funded" section, and a "Current Interest Rates" section. The footer contains links to Regulations.gov, SBA.gov, and Whitehouse.gov, along with the SBA logo and the text "U.S. Small Business Administration, 409 3rd St., SW, Washington, DC 20416".

Capital Access Dashboard

Welcome: Ryan Gerald
Tuesday, September 4, 2018
SBA Employee
SBA Official

Account at a Glance

Assigned Office: 710
Email: ryan.gerald@sba.gov
SBA Official: Glenn Hannon
SBA Official Email: glenn.hannon@sba.gov
Last Logged in: September 4, 2018, 10:22 AM

Loans Menu

- 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 (LANA)
- SBA One

Financial Instruments Funded

Portfolio Size & Dollars (in Billions)
684,710 Instruments for

Current Interest Rates

5-Yr Constant Maturity Treasury
504 Note Rate for 10 years
504 Note Rate for 20 years
504 Note Rate for 25 years
LIBOR
SBA Fixed Base Rate
SBA Peg Rate
Wall Street Journal Prime Rate

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

Repor
Glob

Search

Lender Receivables

E-Tran

Lo

Acceleration

Prepayment

SBA Only

Reset Clear Submit Display 150

loans/page, ☒ most recent first ☐ oldest first ☐ Show SQL (OCA only)

Loan	
SBA Loan Number:	
SBA App Number:	
Where and When:	
Lender Location ID:	
MicroLender ID:	
SBIC License Number:	
SBA Office Code:	
Funding date begins:	
Funding date ends:	

Financial Instrument Type:	504 Commitment
Program Code:	Not Selected Yet
Processing Method:	3 Percent Preferred Stock Small Busin
Purchase Indicator:	Guaranty Purchased, Lender Serviced
Special Purpose Code:	(7a) (19) Small Certified Loans
Status:	Active Un-D

Address Associated:	
Type of Address:	Loan Mailing Address
Partial Street Address (Contains):	
Partial Zip Code:	
Partial City Name:	
State:	
Business Associated:	
EIN/SSN:	
Partial Name:	
Person Associated:	
SSN:	
Partial First Name:	
Partial Last Name:	
Partial Name Restrictions:	
Searches by Partial Name must include at least one other search criterion.	

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
1	21465	2020-04-03	76289950-03	3D Computer Corp.	Paycheck Protection Progr...	\$250,000.00	Research	2103 Grant Street	Bellingham	
2	21444	2020-04-02	76288950-08	PB Coast, inc.	Paycheck Protection Progr...	\$208,300.00	Research	440 Parker Farm Drive	Wilmington	
3	21439	2020-04-02	76288850-05	3D Computer Corp.	Paycheck Protection Progr...	\$250,000.00	Research	2103 Grant Street	Bellingham	
4	21438	2020-04-02	76288750-02	3D Computer Corp.	Paycheck Protection Progr...	\$250,000.00	Research	2103 Grant Street	Bellingham	
5	21437	2020-04-02	76288650-10	3D Computer Corp.	Paycheck Protection Progr...	\$250,000.00	Research	2103 Grant Street	Bellingham	
6	21433	2020-04-02	76288350-01	3D Computer Corp.	Paycheck Protection Progr...	\$250,000.00	Research	2103 Grant Street	Bellingham	
7	21428	2020-04-02	76287850-10	3D Computer Corp.	Paycheck Protection Progr...	\$250,000.00	Research	2103 Grant Street	Bellingham	
8	21424	2020-04-02	76287650-04	Dalen Enterprises, 55 Inc.	Paycheck Protection Progr...	\$3,200.00	Research	185 S Union Road	MANTECA	
9	21295	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 Test Business

Servicing Location ID 455644 Servicing Location Name Live Oak Banking Company

SBA Servicing Office (0626) LITTLE ROCK COMMERCIAL LOAN SERVICING CENTER

Cohort Code CARES Legislative Indicator

Underwriting Authority LNDR

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) processing fees, Lender certifies (1) 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