



# 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 responsible operator of a primary agency, regarding any communication or data handling or stored on this information system. At any time, the government has the right to monitor and control the use of this information system. It may be used for any purpose, including but not limited to, the information system.  
Any communication or data handling or stored on this information system may be monitored or used for any other government purpose.  
Your consent to this and to the availability of this, may not be in any agreement or information system, including but not limited to any agreement of privacy regarding communication or data system, whether oral or written, by your supervisor or any other official, except the SBA Chief Information Officer.

I agree to these terms.

Login

**Program Information**

Feb 23, 2018  
Fees for 2018 and 2019  
Download the latest SBA 1320 form. Download the latest SBA 1320 form.

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

**News**

**Congressional Reports**  
Activity by Congressional District Report

**CAFS Requirements**  
JavaScript should be enabled. Add this site to your PopUp exception list of sites.  
The following browsers are supported: Chrome Version 60+, Firefox Version 52+, Edge Version 16+

**SBA Today**

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

Instrument	Value
5,099,413 Instruments for	171

**Financial Instruments Funded FY 2010**

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 Minority	46
SBC Commitments	30

**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	9.22%
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 '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	

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