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# Microloan Program Electronic Reporting System (MPERS)



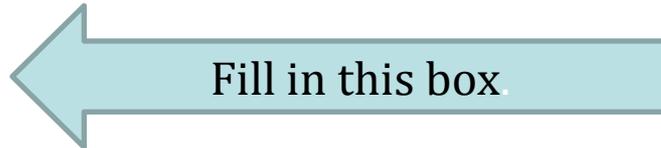


# How To's

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- Securely access the microloan reporting system
- Build microloan program data
- Create reports
- Utilize the dashboard

# Reading the Road Signs



Fill in this box. Always! It is the blue highlighted guide to a successful trip through MPERs Throughout the system, the blue highlighted box means – MANDATORY Data.

**Zip+4 Code:**

**Street Address:**

**City Name:**

**State:** No box to fill in!

Always Click to populate the State field

**Zip+4 Code:**

**Street Address:**

**City Name:**

**State:** VA

Always Click to populate the State field

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# Security and Sign In



# General Login System

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- Before you request access to MPERs
    - Request a User ID and Password to enter the GLS (General Login System)
    - Every user needs a separate GLS login
    - Security profiles are required for
      - Employees
- And
- Contractors

# Contact Your Analyst

---

- Ask your analyst for the Location ID

*then*

- Log into [https://eweb.sba.gov/gls/dsp\\_login.cfm](https://eweb.sba.gov/gls/dsp_login.cfm)

System Login - Microsoft Internet Explorer provided by SBA

https://eweb.sba.gov/gls/dsp\_login.cfm

File Edit View Favorites Tools Help

System Login

Skip Navigation Accessibility

**SBA** General Login System Help

May 03, 2011

- [Forgot User ID?](#)
- [Forgot Password?](#)
- [Instructions for GLS](#)
- [Request SBA User ID](#)
- [Contact SBA Security](#)

SBA Account Login

User ID:

Password:

Login Clear

[Text Only](#)

Last modified: 04/19/2010 12:00:00 AM

> [FirstGov](#) > [E-Gov](#) > [Regulations.gov](#) > [White House](#)

\* [Privacy & Security](#) \* [Information Quality](#) \* [FOIA](#) \* [No Fear Act](#) \* [ADA](#)

SBA Processing: 0.103 seconds  
Session timeout in 60 minutes.

Local intranet 100%

Start Outlook Today ... Inbox - Microso... Calendar - Mic... C:\Documents ... C:\Documents ... Microsoft Powe... System Login...

12:53 PM Tuesday

Web address

Ignore SBA Account Login until *after* you request your User ID and Password

Click here to request User ID



Request GLS Account - Microsoft Internet Explorer provided by SBA

https://eweb.sba.gov/gls/dsp\_addcustomer.cfm

File Edit View Favorites Tools Help

Request GLS Account

Skip Navigation Accessibility/Help

**SBA** General Login System

GLS Login

**Login Information**

User ID:

**Identity Information**

Name: (First) (Middle) (Last) (Suffix - Jr, Sr, I, II, etc)

Date of Birth:

PIN:  (Personal Identification Number, Last 4 Digits of SSN)

**Contact Information**

Country:

Zip+4 Code:

Street 1:

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SBA Processing: 0.835 seconds  
Session timeout in 59 minutes.

Done Local intranet 100%

Start Outlook Today... Inbox - Micros... Calendar - Micr... C:\Documents ... C:\Documents ... Microsoft Pow... Request GLS ... 12:57 PM Tuesday

The screenshot shows a web browser window displaying the SBA GLS Account creation form. A light blue callout box with a black border is positioned at the top right, containing the text "Create a User ID - Eight characters Then fill in all blue highlighted boxes". Three arrows originate from this box: one points to the "User ID" input field, another points to the "Last" name input field, and a third points to the "Date of Birth" input field. The "User ID", "Last" name, and "Date of Birth" fields are highlighted with a light blue border. The "Country" dropdown menu is set to "UNITED STATES". The "Zip+4 Code" section has two input fields and a "Lookup Zip" button. The "Street 1" field is a single wide input field. The browser's address bar shows the URL "https://eweb.sba.gov/gls/dsp\_addcustomer.cfm". The Windows taskbar at the bottom shows the Start button, several application icons, and the system clock displaying "12:57 PM Tuesday".

Create a User ID - Eight characters  
Then fill in all blue highlighted boxes



Request GLS Account - Microsoft Internet Explorer provided by SBA

https://eweb.sba.gov/gls/dsp\_addcustomer.cfm

File Edit View Favorites Tools Help

Request GLS Account

Skip Navigation Accessibility Options

**SBA** General Login System Help

- GLS Login

**Zip+4 Code:**

**Street 1:**

Street 2:

**City Name:**  (State)

**Phone Number:** (Country) (Area Code) (Phone Number) (Extension)  
(US is 1) (999-9999)

**E-Mail Address:**

**Re-enter E-Mail:**

**Federal Agency Information**

**Are you a Federal Employee ?:**  NO  Yes

When all blue highlighted boxes are completed scroll to the bottom of page click submit

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SBA Processing: 0.25 seconds  
Session timeout in 59 minutes

Local intranet 100%

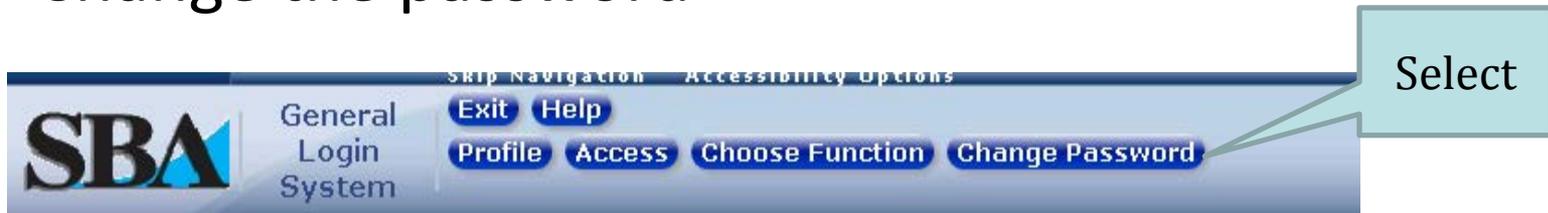
start | Inbox - Microsoft ... | 6 Windows Expl... | Microsoft PowerP... | Request GLS Acco... | 2:45 PM



# Password from IT Security

---

- Within a few hours, you will receive your new password in an email from IT Security
- Sign in to GLS with the emailed password
- Change the password



- Now – You are ready to request Access to MPERs

System Login - Microsoft Internet Explorer provided by SBA

https://eweb.sba.gov/gls/dsp\_login.cfm

File Edit View Favorites Tools Help

System Login

Skip Navigation Accessibility Options

**SBA** General Login System [Help](#)

May 03, 2011

- [Forgot User ID?](#)
- [Forgot Password?](#)
- [Instructions for GLS](#)
- [Request SBA User ID](#)
- [Contact SBA Security](#)

SBA Account Login

User ID:

Password:

Login Clear

[Text Only](#)

Last modified: 04/19/2010 12:00:00 AM

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SBA Processing: 0.103 seconds  
Session timeout in 60 minutes

Local intranet 100%

Start

Outlook Today ... Inbox - Microso... Calendar - Micr... C:\Documents ... C:\Documents ... Microsoft Powe... System Login...

12:53 PM Tuesday



Choose Function - Microsoft Internet Explorer provided by SBA

https://eweb.sba.gov/gls/dsp\_choosefunction.cfm

File Edit View Favorites Tools Help

Choose Function

Skip Navigation Accessibility Options

Exit Help

Profile Access Choose Function Switch Office Change Password

Ready

Welcome to Great Development Corp Office 7100: OFFICE OF CAPITAL ACCESS

General Login System - Choose Function

Currently Available Applications

- Code Tables
- MicroLoan Program Electronic Reporting System (MPERS)

Click **Access** button

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SBA Processing: 0.235 seconds  
Session timeout in 59 minutes.

Local intranet 100%

start Deleted Items - M... 6 Windows Expl... Microsoft PowerP... Choose Function - ... 2:59 PM

Update System Access - Microsoft Internet Explorer provided by SBA

https://eweb.sba.gov/gls/dsp\_access.cfm

Skip Navigation Accessibility Options

**SBA** General Login System **Exit Help Profile Access Choose Function Change Password** Ready

Welcome Great Development Corp

Entrepreneurial Development Management Informa

HUBZones

MicroLoan Program Electronic Reporting System (MPERS)

Submit MicroLoan Electronic Reports ([Show/Hide](#))

Location Id  [Look Up](#)

PRO-NET / DSBS

Partner Information Management System (PIMS)

Subcontracting Network (Sub-Net)

Surety Bond Guarantee Systems (SBG/PSB)

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SBA Processing: 1.058 seconds  
Session timeout in 60 minutes

Local intranet 100%

Start Outlook Today - Mi... Inbox - Microsoft O... Calendar - Microsof... C:\Documents and ... Microsoft PowerPoi... Update System A... 3:44 PM Tuesday



Update System Access - Microsoft Internet Explorer provided by SBA

https://eweb.sba.gov/gls/dsp\_access.cfm

File Edit View Favorites Tools Help

Update System Access

Skip Navigation Accessibility Options

**SBA** General Login System Ready

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

**Welcome Great Development Corp**

- SBA Employee Grants system access / user-roles for E504GovWSUser
- SBA Employee to enter requests for user-role E504WSUser
- SBA Employee to enter requests for system access/ user-roles for PBLTS System
- SBA Employee to enter requests for user-role PBLTSRegion
- SBA Employee to enter requests for system access/ user-roles for LoanBorrowSearch System
- SBA Employee to enter requests for system access/ user-roles for LoanPostServ System
- Security System Administration

- Subcontracting Network (Sub-Net)
- Success Stories
- Surety Bond Guarantee Systems (SBG/PSB)
- Technology Network (TECH-Net)
- WebChat
- Women-Owned Small Business Program Repository (WOSBPR) *(You can select only one role for this system.)*

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SBA Processing: 5.436 seconds  
Session timeout in 59 minutes

Local intranet 100%

start Deleted Items - M... 6 Windows Expl... Microsoft PowerP... Update System Ac... 3:10 PM

Scroll to the bottom of the page. Click Submit



System Login - Microsoft Internet Explorer provided by SBA

https://enile.sba.gov/gls/dsp\_login.cfm

File Edit View Favorites Tools Help

Links Customize Links

System Login

Skip Navigation Accessibility Options

**TEST** General Login System **Help** Ready

March 29, 2012 V:3.8

- [Forgot User ID?](#)
- [Forgot Password?](#)
- [Instructions for GLS](#)
- [Request SBA User ID](#)
- [Contact SBA Security](#)

SBA Account Login

User ID:

Password:

Login Clear

[Text Only](#)

Last modified: 04/19/2010 12:00:00 AM

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SBA Processing: 0.128 seconds  
Session timeout in 60 minutes.

Done Local intranet 100%

Log In to GLS



Choose Function - Microsoft Internet Explorer provided by SBA

https://eweb.sba.gov/gls/dsp\_choosefunction.cfm

File Edit View Favorites Tools Help

Choose Function

Skip Navigation Accessibility Options

**SBA** General Login System

Exit Help Profile Access Choose Function Change Password

Ready

Welcome: Great Development Corp

**General Login System - Choose Function**  
**Currently Available Applications**

- MicroLoan Program Electronic Reporting System (MPERS)
- SBA's Online Phone Directory

Do you wish to [Update Profile?](#)

This is your new link to  
MPERS

Last modified: 06/05/2009 12:00:00 AM

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SBA Processing: 0.186 seconds  
Session timeout in 60 minutes.

Local intranet 100%

Start

Outlook Today - Mi... Inbox - Microsoft O... Calendar - Microsof... C:\Documents and ... Microsoft PowerPoi... Choose Function ...

3:45 PM Tuesday



Microloan Application - Microsoft Internet Explorer provided by SBA

https://enile.sba.gov/microloan/dsp\_welcome.cfm

File Edit View Favorites Tools Help

Links Customize Links

Microloan Application

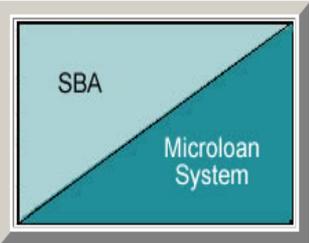
Skip Navigation Accessibility Options

TEST MicroLoan Search Exit Help

Expand Collapse

- Lender Portfolio
  - Lender Detail
  - Loan Search
  - Borrower Search
- Portfolio Status
  - Snapshot Summary
  - Update Portfolio
  - Snapshot Detail
  - CO/PIF Loans
- Intermediary Dashboard
  - Manage Participants
  - Manage TA / Training
    - Enter TA Data

Welcome



Version 2.0

[Text Only](#)

Last modified: 04/22/2011 12:00:00 AM SBA Processing: 0.328 seconds

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Session timeout in 56 minutes

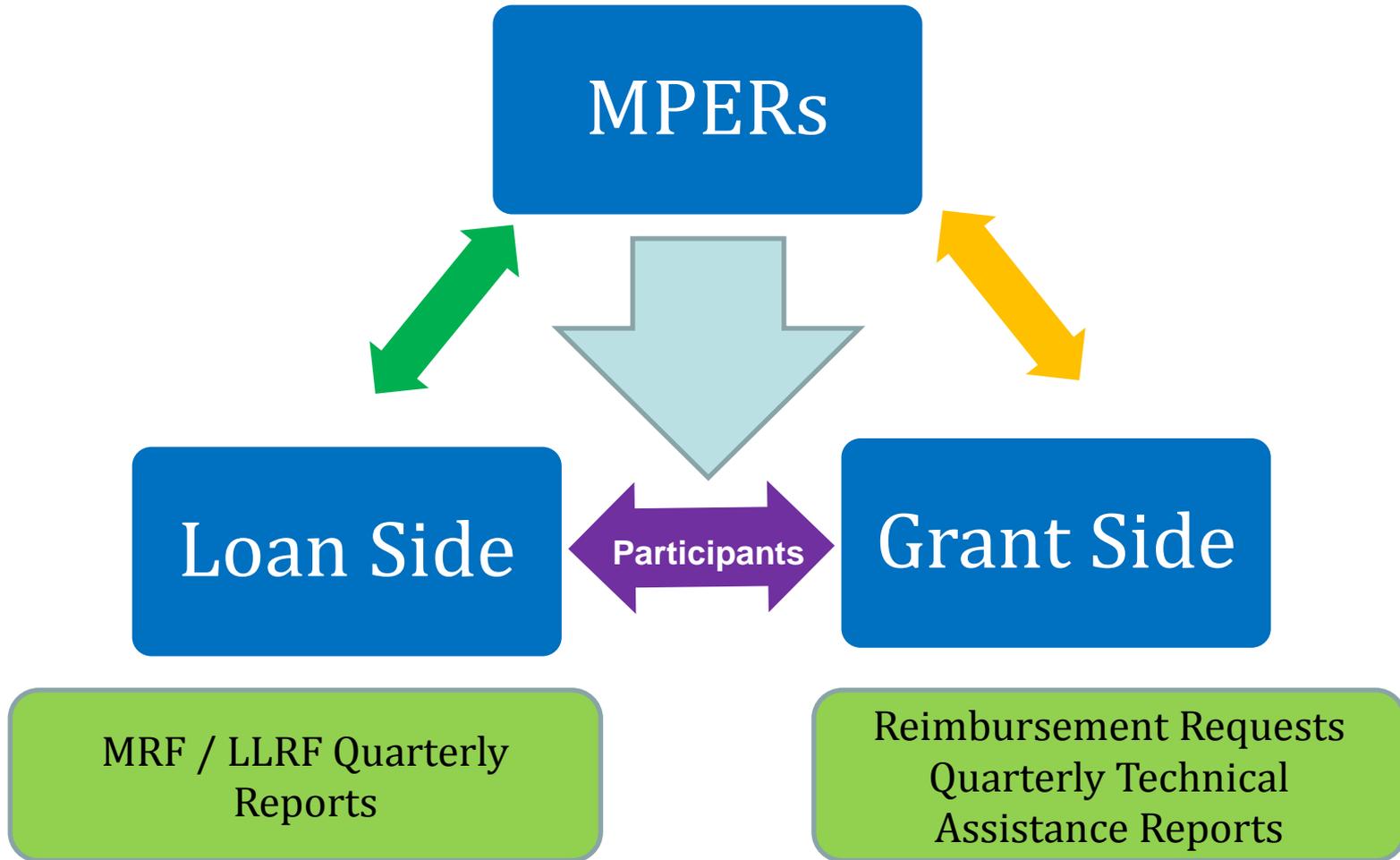
Local intranet 100%

Menu for  
Data, Reports, and  
Tasks



# Navigating the System

---



---

# Building the Participant Data



## Participant Data

---

### **Participant Data is Utilized**

- To Create New Loan Records**
- To Create Technical Assistance Records**

# Note: Two Routes to Creating Participant Record

---

Via  
Manage Participants  
On Intermediary  
Dashboard Menu

Via  
Add New Loan  
link  
On Lender Detail  
Report

# Route 1- Manage Participant Data

---

Via  
Manage Participants  
On Intermediary  
Dashboard Menu

Go to Intermediary Dashboard Menu.....>>>

Microloan Application - Microsoft Internet Explorer provided by SBA

https://enile.sba.gov/microloan/dsp\_welcome.cfm

File Edit View Favorites Tools Help

Links Customize Links

Microloan Application

Skip Navigation Accessibility Options

Search Exit Help

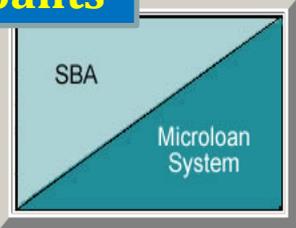
# TEST MicroLoan

Expand Collapse

- Lender Portfolio
  - Lender Detail
  - Loan Search
  - Borrower Search
- Portfolio Status
  - Snapshot Summary
  - Update Portfolio
  - Snapshot Detail
  - CO/PIF Loans
- Intermediary Dashboard
  - Manage Participants**
  - Manage TA / Training
    - Enter TA Data

Welcome

Select  
**Manage Participants**



SBA  
Microloan System

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Last modified: 04/22/2011 12:00:00 AM SBA Processing: 0.457 seconds

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Session timeout in 60 minutes.

https://enile.sba.gov/microloan/ Local intranet 100%



Microloan Application - Microsoft Internet Explorer provided by SBA

https://enile.sba.gov/microloan/dsp\_welcome.cfm

TEST MicroLoan

Skip Navigation Accessibility Options

Search Exit Help

Expand Collapse

- Lender Portfolio
  - Lender Detail
  - Loan Search
  - Borrower Search
- Portfolio Status
  - Snapshot Summary
  - Update Portfolio
  - Snapshot Detail
  - CO/PIF Loans
- Intermediary Dashboard
  - Manage Participants
  - Manage TA / Training
    - Enter TA Data

**Manage Participants**

**Great Development Corp**  
1400 Good Hope Rd  
Washington, DC 20020

Select Participant Intake

Participant Intake Search:  Go Clear

Name	Company	Address	Submitted By	Submitted On	Last Updated By	Last Update On
<a href="#">New New</a>	NEW	Lee Rd, FAIRFAX, VA 22031	Palley, Saritha	03/28/2012	Palley, Saritha	03/28/2012
<a href="#">Hello Hello</a>	Hello	Hello Ct, HERNDON, VA 20171	Palley, Saritha	02/29/2012	Palley, Saritha	03/28/2012

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Session timeout in 60 minutes

tps://enile.sba.gov/microloan/new/dsp\_participant\_intake.cfm

Local intranet 100%



Microloan Application - Microsoft Internet Explorer provided by SBA  
https://enile.sba.gov/microloan/dsp\_welcome.cfm

File Edit View Favorites Tools Help  
Links Customize Links

Microloan Application

Skip Navigation Accessibility Options  
Search Exit Help

# TEST MicroLoan

Expand Collapse

- Lender Portfolio
  - Lender Detail
  - Loan Search
  - Borrower Search
- Portfolio Status
  - Snapshot Summary
  - Update Portfolio
  - Snapshot Detail
  - CO/PIF Loans
- Intermediary Dashboard
  - Manage Participants
  - Manage TA / Training
    - Enter TA Data

## Great Development Corp

1400 Good Hope Rd  
Washington, DC 20020

### Participant Demographics

First Name:

Middle Name:

Last Name:

Phone Number:  Ex. 704-344-6640

Fax Number:  Ex. 704-344-6640

Email Address:

Zip+4 Code:

Street Address:

City Name:

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Session timeout in 60 minutes.

Local intranet 100%

Fill in all highlighted boxes



Microloan Application - Microsoft Internet Explorer provided by SBA

https://enile.sba.gov/microloan/dsp\_welcome.cfm

File Edit View Favorites Tools Help

Links Customize Links

Microloan Application

Skip Navigation Accessibility Options

TEST MicroLoan Search Exit Help

Expand Collapse

- Lender Portfolio
  - Lender Detail
  - Loan Search
  - Borrower Search
- Portfolio Status
  - Snapshot Summary
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  - Snapshot Detail
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    - Enter TA Data

### Business Information

Trade Name: JJs

Date Business Formed: 03/30/2012 Ex. 01/31/2011

Business Status: Pre-Startup

Organization: Limited Liability Company(LLC)

Woman Owned: < 51% Female Owned

Location:  Rural  Urban

Child Care:  Yes  No

NAICS Code: 711110 [NAICS look-up](#)

Theater Companies and Dinner Theaters

Cancel Submit

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Session timeout in 59 minutes.

act\_participant\_intake.cfm

Local intranet 100%

Click on Submit



Microloan Application - Microsoft Internet Explorer provided by SBA

https://enile.sba.gov/microloan/dsp\_welcome.cfm

File Edit View Favorites Tools Help

Links Customize Links

Microloan Application

Skip Navigation Accessibility Options

Search Exit Help

**TEST** MicroLoan

Expand Collapse

- Lender Portfolio
  - Lender Detail
  - Loan Search
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- Portfolio Status
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<a href="#">Barry Weiner</a>	Triangle Welding	...RLINGTON, VA 22209	bank3, john3	06/15/2011	McFuddle, Chaz	10/12/2011
<a href="#">Employee of PostLoanBorrower</a>	Bookkeeper for PostLoan Borrower	...er Harbor, RESTON, VA	bank3, john3	01/05/2012		
<a href="#">Brigette Harrington</a>	Brigette B. Harrington	25...aylor Rd., SE, WASHINGTON, DC 20002	bank3, john3	08/11/2011	McFuddle, Chaz	10/05/2011
<a href="#">Robert Bruce</a>	Gedup	34...unnyvale Dr, FERNANDINA BEACH, FL 32035	bank3, john3	06/22/2011	Doyle, Robert	02/08/2011
<a href="#">JJs</a>	JJs	409 3rd St, WASHINGTON, DC 20024	bank3, john3	03/30/2012		
<a href="#">Jay Morgan</a>	Go Get Um	409 3rd Street, WASHINGTON, DC 20024	bank3, john3	03/29/2012	bank3, john3	03/29/2011
<a href="#">Bob Upham</a>	Bob's MATCO Tool Business	125 East Big River Road, CLIFTON, VA 20124	bank3, john3	01/05/2012		
<a href="#">Dan Upham</a>	Dan's Demolition	123 Main Street, CLIFTON, VA 20124	bank3, john3	01/05/2012		
<a href="#">Eduardo M</a>	n/a	134 Main Street, CHICAGO, IL 60607	bank3, john3	12/05/2011		
<a href="#">Walter Wade</a>	Rods and Waders	1234 4th Street, WASHINGTON, DC 20001	bank3, john3	09/21/2011	bank3, john3	09/28/2011

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Session timeout in 59 minutes.

Local intranet 100%

New Participant now is listed in the Participant Intake detail screen



---

# How to Enter a New Loan



# Loans

---

- Loan related tasks and reporting are based on the participant list.
  - We just entered participant information for a prospective microloan borrower
  - Use the participant record to create the loan record when the prospective borrower becomes the new borrower

# Route 2: Via the Lender Detail Report

---

The second route to create participant records is:

Via  
[Add New Loan](#)  
link  
On Lender Detail  
Report

Go to the Lender Detail Report.....>>>

Microloan Application - Microsoft Internet Explorer provided by SBA

https://eweb.sba.gov/microloan/dsp\_welcome.cfm

File Edit View Favorites Tools Help

Links Customize Links

Microloan Application

Skip Navigation Accessibility Options

Reports Search Admin Exit Help

SBA MicroLoan

Welcome

Select Lender Detail

Lender Search  
Loan Search  
Borrower Search  
Lender Portfolio  
Lender Detail  
Portfolio Status  
Nationwide Snapshot  
Snapshot Summary  
Update Portfolio  
Snapshot Detail  
CO/PIF Loans  
Analyst Dashboard  
Search Reports  
Assoc. MRF / LLRF  
Send Intermediary  
Assign Analysts

SBA  
Microloan System

Version 2.0

[Text Only](#)

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Session timeout in 52 minutes

Local intranet 100%

Start My Computer Microloan ... Microloan Pr... untitled - Paint Paint Document1 ... I.R.I.S. 4:30 PM



Microloan Application - Microsoft Internet Explorer provided by SBA

https://eweb.sba.gov/microloan/dsp\_welcome.cfm

File Edit View Favorites Tools Help

Microloan Application

Skip Navigation Accessibility Options

Reports Search Admin Exit Help

SBA MicroLoan

Expand Collapse

- Lender Search
- Loan Search
- Borrower Search
- Lender Portfolio
  - Lender Detail
- Portfolio Status
  - Nationwide Snapshot
  - Snapshot Summary
  - Update Portfolio
  - Snapshot Detail
  - CO/PIF Loans

**Lender Detail**

Lender Id: 188356  
 Lender Name:  
 Address:  
 City: Zip Code: 20020  
 Phone Number:  
 Program Start Dt: Program End Dt: 09/30/2004  
 SBA Loans: 56846530

Select [Add New Loan](#) within seven days of closing

**Microloans**

[Add New Loan](#)

Loan Seq#	Closing Dt	Loan Status	Loan Amount	Lender's Loan	C/I	Borrower
<a href="#">2208</a>	09/07/95	Delinquent (121 days & over)	\$10,000.00	ADC009	C	Brigette B. Harrington
<a href="#">2207</a>	12/11/95	Current (30 days & under)	\$25,000.00	ADC011	C	Barbara Vance
<a href="#">1017</a>	04/09/96	Current (30 days & under)	\$25,000.00	ADC013	C	Demetrius and Tracye Moore
<a href="#">1016</a>	02/13/96	Current (30 days & under)	\$25,000.00	ADC012	C	Charles Summers
<a href="#">1015</a>	04/09/95	Current (30 days & under)	\$25,000.00	ADC013	C	City Wings of D.C., Inc.
<a href="#">1014</a>	07/18/96	Delinquent (121 days & over)	\$1,000.00	AD0016	C	Ms. Yavocka D. Wilson
<a href="#">1013</a>	07/18/96	Current (30 days & under)	\$15,000.00	ADC015	C	Mr. LaJuan Howard and Mr. Curtis Howard
<a href="#">1012</a>	05/15/96	Current (30 days & under)	\$25,000.00	ADC014	C	Mr. Eustace O. Uku
<a href="#">231</a>	11/10/95	Delinquent (121 days & over)	\$15,000.00	ADC010	C	Brigette B. Harrington
<a href="#">230</a>	11/18/93	Paid in Full	\$7,500.00	ADC001	C	William Tyrone Bullock
<a href="#">229</a>	11/22/93	Paid in Full	\$7,500.00	ADC002	C	Charles Summers and Carol House

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Session timeout in 59 minutes.

Local intranet 100%

start Deleted Items - ... 6 Windows Exp... Microsoft Power... Microloan Applic... https://eweb.sba... 3:35 PM



Skip Navigation Accessibility Options

**TEST** MicroLoan

[Search](#) [Exit](#) [Help](#)

- Expand | Collapse
- Lender Portfolio
    - Lender Detail
    - Loan Search
    - Borrower Search
  - Portfolio Status
    - Snapshot Summary
    - Update Portfolio
    - Snapshot Detail
    - CO/PIF Loans
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    - Manage Participants
    - Manage TA / Training
      - Enter TA Data

### Choose Participant

Please choose the participant the microloan is being made out to:

If the desired participant is not in the list above, please [add the participant](#) first.

Choose  
Borrower from  
TA Participant  
list



The screenshot shows a web browser window with the URL <https://enile.sba.gov/micro>. The page title is "Microloan Application - Microsoft Internet Explorer". A dropdown menu is open, listing various borrower names. The name "Ups, Dan (Dan's Racing)" is highlighted. Below the list, there is a text prompt: "out to: If the desired participant is not in the list above, please...". A callout box with a light blue background and a pointer to the dropdown menu contains the text: "If Borrower is not already on the list, Enter their TA Pre Loan intake information to add them to the list now." The left sidebar contains a navigation menu with items like "Lender Portfolio", "Loan Search", and "Manage Participants". The footer includes navigation links like "> FirstGov", "> E-Gov", and "> Regulations.gov", along with a session timeout notice: "Session timeout in 59 minutes." and a "Local intranet" indicator.

If Borrower is not already on the list,  
 Enter their TA Pre Loan intake  
 information to add them to the list  
 now.





- Expand | Collapse
- Lender Portfolio
  - Lender Detail
  - Loan Search
  - Borrower Search
- Portfolio Status
  - Snapshot Summary
  - Update Portfolio
  - Snapshot Detail
  - CO/PIF Loans
- Intermediary Dashboard
  - Manage Participants
  - Manage TA / Training
    - Enter TA Data

### Choose Participant

Please choose the participant the microloan is being made out to:

If the desired participant is not in the list above, please [add the participant](#) first.

Choose [add the participant](#) first



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https://enile.sba.gov/microloan/dsp\_welcome.cfm

File Edit View Favorites Tools Help  
Links Customize Links

Microloan Application

Skip Navigation Accessibility Options  
Search Exit Help

**TEST** MicroLoan

Expand Collapse

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  - Manage Participants
  - Manage TA / Training
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Washington, DC 20020

### Participant Demographics

First Name:

Middle Name:

Last Name:

Phone Number:  Ex. 704-344-6640

Fax Number:  Ex. 704-344-6640

Email Address:

Zip+4 Code:   Lookup Zip

Street Address:

City Name:

State:

Borrower: No

EIN:

Intake Date:

> FirstGov > E-Gov > Regulations.gov > White House  
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Enter required data into all blue highlighted boxes.



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Skip Navigation Accessibility Options

TEST MicroLoan Search Exit Help

Expand Collapse

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- Intermediary Dashboard
  - Manage Participants**
  - Manage TA / Training
    - Enter TA Data

**Choose Participant**

Please choose the participant the microloan is being made out to:

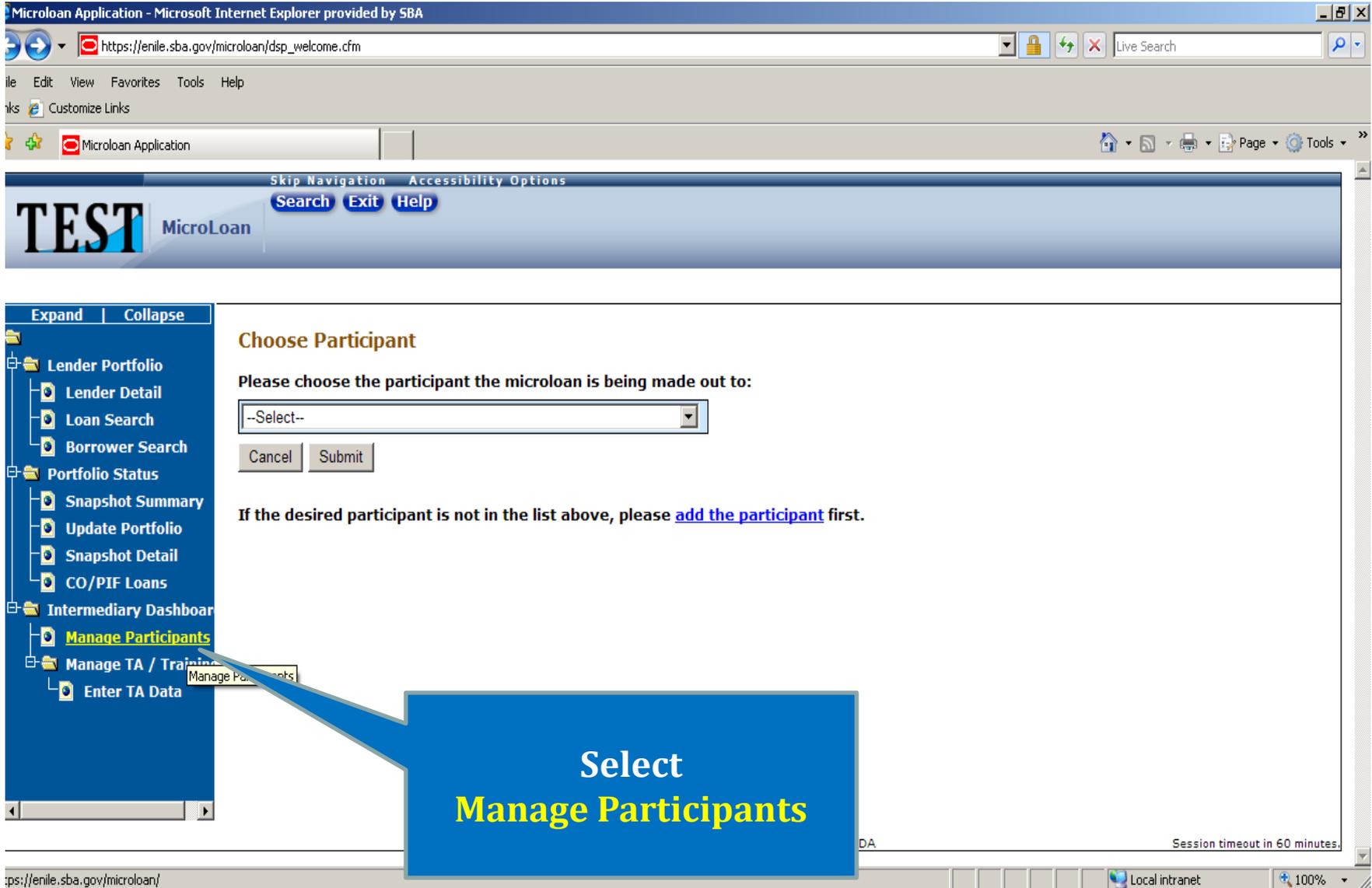
--Select--

Cancel Submit

If the desired participant is not in the list above, please [add the participant](#) first.

Session timeout in 60 minutes.

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TEST MicroLoan

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  - Manage TA / Training
    - Enter TA Data

### Manage Participants

**Great Development Corp**  
1400 Good Hope Rd  
Washington, DC 20020

Select Participant Intake

[Participant Intake](#) Search:  Go Cle

Name	Company	Address	Submitted By	Submitted On	Last Updated By	Last Update On
<a href="#">New New</a>	NEW	Lee Rd, FAIRFAX, VA 22031	Palley, Saritha	03/28/2012	Palley, Saritha	03/28/2012
<a href="#">Hello Hello</a>	Hello	Hello Ct, HERNDON, VA 20171	Palley, Saritha	02/29/2012	Palley, Saritha	03/28/2012

> FirstGov > E-Gov > Regulations.gov > White House  
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Session timeout in 60 minutes

Local intranet 100%



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File Edit View Favorites Tools Help  
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Skip Navigation Accessibility Options  
Search Exit Help

# TEST MicroLoan

Expand Collapse

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  - Snapshot Detail
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    - Enter TA Data

## Participant Demographics

**First Name:** Jay  
**Middle Name:** P  
**Last Name:** Morgan

**Phone Number:** 703-344-6640 Ex. 704-344-6640  
**Fax Number:** 703-444-6640 Ex. 704-344-6640  
**Email Address:** jjmorgan@gogetum.com

**Zip+4 Code:** 20024

**Street Address:** 409 3rd Street

**City Name:** WASHINGTON

**State:** DC

**Borrower:** No  
**EIN:**

**Intake Date:** 02/09/2012

[FirstGov](#) [E-Gov](#) [Regulations.gov](#)  
[Privacy & Security](#) [Information Quality](#) [FOI](#)

Error on page.

Fill in all required details.  
(Required = Highlighted)  
Tip:  
Fill in Street Address  
and City Name  
- then -5 digit zip code  
-then click on Lookup Zip to populate  
State field



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https://enile.sba.gov/microloan/dsp\_welcome.cfm

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Skip Navigation Accessibility Options

**TEST** MicroLoan Search Exit Help

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### Business Information

Trade Name:

Date Business Formed:  Ex. 01/31/2011

Business Status:

Organization:

Woman Owned:

Location:  Rural  Urban

Child Care:  Yes  No

NAICS Code:  [NAICS look-up](#)

Gross Annual Revenue Sales as of intake:

Cancel Submit

Session timeout in 32 minutes

FirstGov > E-G...  
\* Privacy & Security \* Info

Error on page. Local intranet 100%

**Scroll Down to fill in Business Details Then Click Submit**



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https://enile.sba.gov/microloan/dsp\_welcome.cfm

File Edit View Favorites Tools Help

Links Customize Links

Microloan Application

Skip Navigation Accessibility Options

**TEST** MicroLoan

Search Exit Help

Expand Collapse	<a href="#">Julie Jones</a>	Jones Sewing	309 3rd Street, ARLINGTON, VA 22201	bank3, john3	09/28/2011	Palley, Saritha	02/24/2011
Lender Portfolio	<a href="#">Barry Weiner</a>	Triangle Welding	242 rte 29, ARLINGTON, VA 22209	bank3, john3	06/15/2011	McFuddle, Chaz	10/12/2011
Lender Detail	<a href="#">Employee of PostLoanBorrower</a>	Bookkeeper for PostLoan Borrower	11400 Center Harbor, RESTON, VA 20194	bank3, john3	01/05/2012		
Loan Search	<a href="#">Brigette Harrington</a>	Brigette B. Harrington	2548 Naylor Rd., SE, WASHINGTON, DC 20002	bank3, john3	08/11/2011	McFuddle, Chaz	10/05/2011
Borrower Search	<a href="#">Robert Bruce</a>	Gedup	344 Sunnyvale Dr, FERNANDINA BEACH, FL 32035	bank3, john3	06/22/2011	Doyle, Robert	02/08/2011
Portfolio Status	<a href="#">Jay Morgan</a>	Go Get Um	409 3rd Street, WASHINGTON, DC 20024	bank3, john3	03/29/2012		
Snapshot Summary	<a href="#">Bob Upham</a>	Bob's MATCO Tool Business	125 East Big River Road, CLIFTON, VA 20124	bank3, john3	01/05/2012		
Update Portfolio	<a href="#">Dan Upham</a>	Dan's Demolition	123 Main Street, CLIFTON, VA 20124	bank3, john3	01/05/2012		
Snapshot Detail	<a href="#">Eduardo M</a>	n/a	134 Main Street, CHICAGO, IL 60607	bank3, john3	12/05/2011		
CO/PIF Loans	<a href="#">Walter Wade</a>	Rods and Waders	1234 4th Street, WASHINGTON, DC 20001	bank3, john3	09/21/2011	bank3, john3	09/28/2011
Manage TA / Training							
Enter TA Data							

[> FirstGov](#) > [E-Gov](#) > [Regulations.gov](#) > [White House](#)  
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Session timeout in 57 minutes.

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New Participant



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Search Exit Help

**TEST** MicroLoan

Expand Collapse

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**Manage Participants**

Now Participant is on the Intake list-  
Return to **Lender Detail** to Add a Loan.

Participant Intake Search:  Go Cle

Name	Company	Address	Submitted By	Submitted On	Last Updated By	Last Update On
<a href="#">New New</a>	NEW	Lee Rd, FAIRFAX, VA 22031	Palley, Saritha	03/28/2012	Palley, Saritha	03/28/201
<a href="#">Hello Hello</a>	Hello	Hello Ct, HERNDON, VA 20171	Palley, Saritha	02/29/2012	Palley, Saritha	03/28/201

> FirstGov > E-Gov > Regulations.gov > White House  
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Session timeout in 60 minutes.

https://enile.sba.gov/microloan/ Local intranet 100%



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File Edit View Favorites Tools Help

Links Customize Links

Microloan Application

Skip Navigation Accessibility Options

**TEST** MicroLoan

Search Exit Help

Expand Collapse

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[Add New Loan](#)

Loan Seq#	Closing Dt	Loan Status	Loan Amount	Lender's Loan	C/I	Borrower
<a href="#">18949</a>	07/07/10	Current (30 days & under)	\$1,000.00	1	I	New New
<a href="#">18948</a>	09/09/09	Current (30 days & under)	\$1,000.00	100	C	Hello Hello
<a href="#">18947</a>	03/28/12	Current (30 days & under)	\$50,000.00	abcd1234	C	Dave Ritter
<a href="#">18946</a>	07/08/10	Current (30 days & under)	\$1,200.00	12	C	John Doe
<a href="#">18945</a>	07/07/11	Current (30 days & under)	\$2,345.00	678	C	John Business
<a href="#">18943</a>	08/08/08	Current (30 days & under)	\$1,000.00	1	I	John Doe
<a href="#">18942</a>	06/06/11	Current (30 days & under)	\$3,000.00	100	C	John Doe
<a href="#">18941</a>	09/09/11	Current (30 days & under)	\$1,000.00	100	I	Julie Jones
<a href="#">18940</a>	07/06/11	Current (30 days & under)	\$1,000.00	1	I	John Doe
<a href="#">18939</a>	09/05/11	Current (30 days & under)	\$2,000.00	12	I	John Doe
<a href="#">18938</a>	08/08/10	Current (30 days & under)	\$2,000.00	1	C	John Doe
<a href="#">18937</a>	09/09/09	Current (30 days & under)	\$1,000.00	12	I	John Doe
<a href="#">18936</a>	12/29/11	Current (30 days & under)	\$4,000.00	X7993	C	Robert Bruce
<a href="#">18935</a>	01/17/12	Current (30 days & under)	\$25,000.00	abc1234	C	John Business
<a href="#">18934</a>	02/03/11	Current (30 days & under)	\$40,000.00	helloloan2	C	Rob Redford
<a href="#">18933</a>	02/04/11	Current (30 days & under)	\$40,000.00	helloloan1	C	Robert Redford

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Session timeout in 60 minutes.

https://enile.sba.gov/microloan/dsp\_loandetail.cfm?RequestTimeout=500&LendrId=11011931&PrId=48618&LoanNumber=12106340

Local intranet 100%

Click on  
Add New Loan



Microloan Application - Microsoft Int...

https://enile.sba.gov/micro

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Customize Links

Microloan Application

**TEST** MicroLoa

Expand Collapse

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--Select--

- Bruce, Robert (Gedup)
- Business, John (Restaurant)
- Doe, John (John Doe Biz)
- Grouch, Oscar (Garbage Movers)
- Ham, Spam (International Foods)
- Harrington, Brigette (Brigette B. Harrington)
- Hello, Hello (Hello)
- Jones, Julie (Jones Sewing)
- M, Eduardo (n/a)
- Miller, Frank (Scenic Ventures)
- Miller, Stanley (Miller Brothers)
- Morgan, Jay (Go Get Um)**
- New, New (NEW)
- PostLoanBorrower, Employee or Bookkeeper for PostLoan Borrower)
- Redford, Robert (Acting Class)
- Ritter, Dave (Dog Days)
- Smith, Rosie (Rosie's Roses)
- Upham, Bob (Bob's MATCO Tool Business)
- Upham, Dan (Dan's pool supply)
- Upham, Dan (Dan's Demolition)
- Ups, Dan (Dan's Racing)
- Ups, Dan (Ups Concrete)
- Wade, Walter (Rods and Waders)
- Weiner, Barry (Triangle Welding)

out to:

If the desired participant is not in the list above, please [add th](#)

Now-  
Jay Morgan of Go Get Um LLC  
is on the Participant List  
Select Jay Morgan

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Session timeout in 59 minutes.

Local intranet 100%



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 https://enile.sba.gov/microloan/dsp\_welcome.cfm

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Skip Navigation Accessibility Options  
 Search Exit Help

**TEST** MicroLoan

**Loan Detail**

\*All bold text fields are required for completion and are needed towards performance goals.

Loan Seq Nmb: **New**

Loan Purpose:  Materials  Equipment  
 Supplies  Inventory  
 Working Capital

Loan Amt:

Installment Amt:

Annual Income:

Low Income:  Yes  No

Woman Owned:

NAICS Code:  [NAICS look-up](#)  
 Support Activities for Nonmetallic Minerals (except

Lender Name:

Status:

Closing Dt:

Interest Rate:

Jobs Created:

Jobs Retained:

Maturity Mos:

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 Session timeout in 59 minutes.

Fill in all Required Fields

Note: For inter... after the

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File Edit View Favorites Tools Help

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Skip Navigation Accessibility Options

TEST MicroLoan Search Exit Help

### Loan Detail

**\*All bold text fields are required for completion and counted towards performance goals.**

Loan Seq Nmb: **New**

Loan Purpose: **Loan Purpose:**

Loan Amt:

Installment Amt:

Annual Income:

Low Income:  Yes  No

Woman Owned:

NAICS Code:  [NAICS look-up](#)

Materials  Equipment  
 Supplies  Inventory  
 Working Capital

Lender Name: **Great Development Corp**

Status:

Closing Dt:

Interest Rate:

Jobs Created:

Jobs Retained:

Maturity Mos:

[> FirstGov](#) > [E-Gov](#) > [Regulations.gov](#) > [White House](#)  
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Session timeout in 34 minutes.

Fill in Loan Details

Great Development Corp



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**TEST** MicroLoan

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Annual Income: \$25,000.00

Low Income:  Yes  No

Woman Owned: < 51% Female Owned

NAICS Code: 213115 [NAICS look-up](#)

Support Activities for Nonmetallic Minerals (except

Guarantor Req:  Yes  No

Guarantor ID:

Collateral Req:  Yes  No

Gross Ann Rcpts: \$100,000.00

Business Status:  Start-up  Existing

Location:  Rural  Urban

Organization: Limited Liability Company (LLC)

Child Care:

SBA Loan No.: 12106340

Lender's Loan: Micro100

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Session timeout in 57 minutes

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Complete all details.  
Be sure to select SBA Loan No!  
to associate microloan  
to SBA funding loan.



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Skip Navigation Accessibility Options  
TEST MicroLoan Search Exit Help

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Street 2:

City Name:    
(State)

Phone Number:

Fax Number:

Date Business Formed:

Ethnicity:

Veteran Status:

Race:

Black or African American  Asian  
 Native Hawaiian or Other Pacific Islander  White  
 American Indian or Alaska Native

Save

Last modified: 02/22/2012 12:00:00 AM SBA Processing: 1.605 seconds  
> FirstGov > E-Gov > Regulations.gov > White House  
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timeout in 7 minutes

100%

Choose Ethnicity and Veteran Status from Drop Down boxes

Choose Race by clicking in the boxes

Click Save



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File Edit View Favorites Tools Help

Customize Links

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TEST MicroLoan

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**\*All bold text fields are required for completion and counted towards performance goals**

Loan Seq Nmb: **18950**

Loan Purpose: **Working Capital**

Loan Amt: **\$50,000.00**

Installment Amt: **\$150.00**

Annual Income: 25000.0000

Low Income:  Yes  No

Woman Owned: **< 51% Female Owned**

NAICS Code: **213115**

Lender Name: **Great Development Corp**

Status: **Complete**

Closing Dt: 03/29/2012

Interest Rate: 6.25

Jobs Created: 2

Jobs Retained: 1

Maturity Mos: 60

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Session timeout in 60 minutes.

Local intranet 100%

When Status indicates **Complete**  
Scroll to Bottom of page.



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https://enile.sba.gov/microloan/dsp\_welcome.cfm

File Edit View Favorites Tools Help  
Links Customize Links

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Skip Navigation Accessibility Options  
Search Exit Help

# TEST MicroLoan

Expand Collapse

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Street 2: \_\_\_\_\_  
City Name: WASHINGTON DC (State)  
Phone Number: \_\_\_\_\_  
Fax Number: 703-444-6640  
Date Business Formed: 06/01/2010  
Ethnicity: Not Hispanic or Latino  
Veteran Status: Veteran  
Race:  
 Black or African American  
 Native Hawaiian or Other Pacific Islander  
 American Indian or Alaska Native

Add Borrower

Last modified: 02/22/2012 12:00:00 AM SBA Processing: 1.386 seconds  
> FirstGov > E-Gov > Regulations.gov > White House  
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Session timeout in 57 minutes

Local intranet 100%

If there is a co-borrower  
Click Add Borrower  
Enter all details for the co-borrower.  
If there is no co-borrower  
Click on Lender Detail to Observe  
the new entry.



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https://enile.sba.gov/microloan/dsp\_welcome.cfm

File Edit View Favorites Tools Help  
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## Choose Participant

Please choose the additional participant

--Select--

Cancel Submit

**Click  
Lender Detail**

If the desired participant is not in the list above, please [add the participant](#) first.

> FirstGov > E-Gov > Regulations.gov > White House  
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Session timeout in 59 minutes

https://enile.sba.gov/microloan/ Local intranet 100%



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    - Enter TA Data

**Microloans**

Add New Loan

Loan Seq#	Closing Dt	Loan Status	Loan Amount	Lender's Loan	C/I	Borrower
<a href="#">18950</a>	03/29/12	Current (30 days & under)	\$50,000.00	Micro100	C	Jay P Morgan
<a href="#">18949</a>	07/07/10	Current (30 days & under)	\$1,000.00	1	I	New New
<a href="#">18948</a>	09/09/09	Current (30 days & under)	\$1,000.00	100	I	Hello Hello
<a href="#">18947</a>	03/28/12	Current (30 days & under)	\$50,000.00	abcd1234	C	Dave Ritter
<a href="#">18946</a>	07/08/10	Current (30 days & under)	\$1,200.00		C	John Doe
<a href="#">18945</a>	07/07/11	Current (30 days & under)	\$2,345.00		C	John Business
<a href="#">18943</a>	08/08/08	Current (30 days & under)	\$1,000.00		I	John Doe
<a href="#">18942</a>	06/06/11	Current (30 days & under)	\$2,000.00		C	John Doe
<a href="#">18941</a>	09/09/11	Current (30 days & under)	\$2,000.00		I	John Doe
<a href="#">18940</a>	07/06/11	Current (30 days & under)	\$2,000.00		I	John Doe
<a href="#">18939</a>	09/05/11	Current (30 days & under)	\$2,000.00		I	John Doe
<a href="#">18938</a>	08/08/10	Current (30 days & under)	\$2,000.00		I	John Doe
<a href="#">18937</a>	09/09/09	Current (30 days & under)	\$2,000.00		I	John Doe
<a href="#">18936</a>	12/29/11	Current (30 days & under)	\$2,000.00		I	John Doe

> First Page

\* Privacy & Security

Local intranet 100%

Loan Sequence # 18950  
= Jay P Morgan

NOTE: Check for Complete Indicator  
C = Complete  
I = Incomplete  
Incomplete microloans require additional data



# Only Complete Loans Count!

---



If Loan shows Incomplete, check all blue highlighted

- boxes
- drop down lists

For grants, **COMPLETE** loan status =

- Included in count to determine grant eligibility
- Included in count to determine % SBA debt for award amount
- Only **Completes** are included!

If you have checked the blue highlighted boxes  
and the status still shows incomplete.....

# Check Jobs Boxes

## Jobs Must = At Least One

Status:

Complete

Closing Dt:

03/29/2012

Interest Rate:

6.25

Jobs Created:

2

Jobs Retained:

1

Maturity Mos:

60



Jobs Created  
or  
Jobs Retained  
must =  
*more than 0* to  
show  
Complete

Status:

Incomplete

Closing Dt:

04/10/2012

Interest Rate:

7.75

Jobs Created:

0

Jobs Retained:

0

Maturity Mos:

48



Jobs Created  
or  
Jobs Retained  
show  
Incomplete  
If = 0

---

## How to Update a Borrower Record

---

**Update**  
**Each Existing Microloan Borrower Record Loan**  
**Balance & Aging Status**  
**Every Month**

Microloan Application - Microsoft Internet Explorer provided by SBA

https://enile.sba.gov/microloan/dsp\_welcome.cfm

Skip Navigation Accessibility Options

Search Exit Help

**TEST** MicroLoan

Expand Collapse

- Lender Portfolio
  - Lender Detail
  - Loan Search
  - Borrower Search
- Portfolio Status
  - Snapshot Summary
  - Update Portfolio**
  - Snapshot Detail
  - CO/PIF Loans
- Intermediary Dashboard
  - Manage Participants
  - Manage TA / Training
    - Enter TA Data

Add New Loan

Loan Search

18949

18948 09/09/09 Current (30 days & under) \$1,000.00 100 C Hello Hello

18947 03/28/12 Current (30 days & under) \$50,000.00 abcd1234 C Dave Ritter

18946 07/08/10 Current (30 days & under) \$1,200.00 12 C John Doe

18945 07/07/11 Current (30 days & under) \$2,345.00 678 C John Business

18943 08/08/08 Current (30 days & under) \$1,000.00 1 I John Doe

18942 06/06/11 Current (30 days & under) \$3,000.00 100 C John Doe

18941 09/09/11 Current (30 days & under) \$1,000.00 100 I Julie Jones

18940 07/06/11 Current (30 days & under) \$1,000.00 1 I John Doe

18939 09/05/11 Current (30 days & under) \$2,000.00 12 I John Doe

18938 08/08/10 Current (30 days & under) \$2,000.00 1 C John Doe

18937 09/09/09 Current (30 days & under) \$1,000.00 12 I John Doe

18936 12/29/11 Current (30 days & under) \$4,000.00 X7993 C Robert Bruce

Lender's Loan C/I Borrower

Micro100 C Jay P Morgan

1 I New New

18948 09/09/09 Current (30 days & under) \$1,000.00 100 C Hello Hello

18947 03/28/12 Current (30 days & under) \$50,000.00 abcd1234 C Dave Ritter

18946 07/08/10 Current (30 days & under) \$1,200.00 12 C John Doe

18945 07/07/11 Current (30 days & under) \$2,345.00 678 C John Business

18943 08/08/08 Current (30 days & under) \$1,000.00 1 I John Doe

18942 06/06/11 Current (30 days & under) \$3,000.00 100 C John Doe

18941 09/09/11 Current (30 days & under) \$1,000.00 100 I Julie Jones

18940 07/06/11 Current (30 days & under) \$1,000.00 1 I John Doe

18939 09/05/11 Current (30 days & under) \$2,000.00 12 I John Doe

18938 08/08/10 Current (30 days & under) \$2,000.00 1 C John Doe

18937 09/09/09 Current (30 days & under) \$1,000.00 12 I John Doe

18936 12/29/11 Current (30 days & under) \$4,000.00 X7993 C Robert Bruce

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Session timeout in 56 minutes.

s://enile.sba.gov/microloan/

Local intranet 100%

Click on Update Portfolio



Microloan Application - Microsoft Internet Explorer provided by SBA  
 https://enile.sba.gov/microloan/dsp\_welcome.cfm

File Edit View Favorites Tools Help  
 Links Customize Links

Microloan Application

Skip Navigation Accessibility Options  
**TEST** MicroLoan Search Exit Help

**Update Portfolio**

Expand Collapse

- Lender Portfolio
  - Lender Detail
  - Loan Search
  - Borrower Search
- Portfolio Status
  - Snapshot Summary
  - Update Portfolio
  - Snapshot Detail
  - CO/PIF Loans
- Intermediary Dashboard
  - Manage Participants
  - Manage TA / Training
    - Enter TA Data

Lender Id:	11011931	Location:	188356
Lender Name:	Great Development Corp		
Address:			
City:		Zip:	20020
Phone Number:		Fax Number:	
Program Start Dt:	09/02/1993	Program End Dt:	09/30/2004
Cumulative Net Default Rate:	2.45%	Total Dollars Loaned :	\$1,715,724.32

SBA Loan Number: 10003440 Retrieve

Last modified: 08/22/2011 12:00:00 Processing: 0.162 seconds

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Session timeout in 60 minutes

Local intranet 100%

Choose SBA Loan from list  
 Click on  
 Retrieve



Microloan Application - Microsoft Internet Explorer provided by SBA

https://enile.sba.gov/microloan/

File Edit View Favorites Links Customize Links

Microloan Ap

**Best Practice:**  
Update Every borrower balance and aging Every month

***Mandatory Practice:***  
Update Every borrower balance Every quarter

**TEST**

**Expand Collapse**

- Expand Lender Portfolio
  - Lender Detail
  - Loan Search
  - Borrower Search
- Portfolio Status
  - Snapshot Summary
  - Update Portfolio
  - Snapshot Detail
  - CO/PIF Loans
- Intermediary Dashboard
  - Manage Participants
  - Manage TA / Training
    - Enter TA Data

**Update Portfolio**

Lender Id: 11011931      Location: 8356

Lender Name: **Great Development Corp.**

Address: \_\_\_\_\_

City: \_\_\_\_\_      Zip: 20020

Phone Number: \_\_\_\_\_      Fax Number: \_\_\_\_\_

Program Start Dt: 09/02/1993      Program End Dt: 03/30/2004

Cumulative Net Default Rate: 2.45%      Total Dollars Loaned: 715,724.32

SBA Loan Number: 12106340      Retrieve

Page Number 1 of 1.

**Microloans for SBA Loan # 12106340**

TOTALS: 30	23	1	1	0	0	4	1	0.00	0	
Loan Seq #	Borrowers	0 to 30	31 to 60	61 to 90	91 to 120	over 120/ Def	PIF	CO	aging	No Chg
*18903	Robert Bruce	30 <input type="radio"/>	60 <input type="radio"/>	90 <input type="radio"/>	120 <input type="radio"/>	DEF <input type="radio"/>	PIF <input checked="" type="radio"/>	CO <input type="radio"/>	\$0.00	<input type="checkbox"/>
*18917	John Doe	30 <input type="radio"/>	60 <input type="radio"/>	90 <input type="radio"/>	120 <input type="radio"/>	DEF <input type="radio"/>	PIF <input checked="" type="radio"/>	CO <input type="radio"/>	\$0.00	<input type="checkbox"/>
*18918	Walter Wade	30 <input type="radio"/>	60 <input type="radio"/>	90 <input type="radio"/>	120 <input type="radio"/>	DEF <input type="radio"/>	PIF <input checked="" type="radio"/>	CO <input type="radio"/>	\$0.00	<input type="checkbox"/>

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 \* Privacy & Security \* Information Quality \* FOIA \* No Fear Act \* ADA

Session timeout in 56 minutes.

https://enile.sba.gov/microloan/      Local intranet      100%



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 https://enile.sba.gov/microloan/dsp\_welcome.cfm

File Edit View Favorites Tools Help  
 Links Customize Links  
 Microloan Application

Skip Navigation Accessibility Options  
 Search Exit Help

**TEST** MicroLoan

Expand Collapse

- Lender Portfolio
  - Lender Detail
  - Loan Search
  - Borrower Search
- Portfolio Status
  - Snapshot Summary
  - Update Portfolio
  - Snapshot Detail
  - CO/PIF Loans
- Intermediary Dashboard
  - Manage Participants
  - Manage TA / Training
    - Enter TA Data

*18932	Robert Redford	30	60	90	120	DEF	PIF	CO			
*18933	Robert Redford	30	60	90	120	DEF	PIF	CO			
*18934	Rob Redford	30	60	90	120	DEF	PIF	CO	\$		
*18935	John Business	30	60	90	120	DEF	PIF	CO	\$2		
*18936	Robert Bruce	30	60	90	120	DEF	PIF	CO	\$4		
*18942	John Doe	30	60	90	120	DEF	PIF	CO	\$3,0		
18948	Hello Hello	30	60	90	120	DEF	PIF	CO	\$1,0		
18945	John Business	30	60	90	120	DEF	PIF	CO	\$2,34		
18946	John Doe	30	60	90	120	DEF	PIF	CO	\$1,200		
18947	Dave Ritter	30	60	90	120	DEF	PIF	CO	\$50,000	00	
18950	Jay P Morgan	30	60	90	120	DEF	PIF	CO	\$50,000	00	
18952	Rosie Smith	30	60	90	120	DEF	PIF	CO	\$10,000	00	
18953	Rosie Smith	30	60	90	120	DEF	PIF	CO	\$10,000	00	

\*\* and grey background indicates that this loan has not been updated for over 30 days.

Submit

Last modified: 08/22/2011 12:00:00 AM SBA Processing: 0.982 seconds

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Session timeout in 59 minutes.

Local intranet 100%

http://www.sba.gov/ada/index.html

Jay P Morgan's  
balance was  
\$50,000



Microloan Application - Microsoft Internet Explorer provided by SBA  
 https://enile.sba.gov/microloan/dsp\_welcome.cfm

File Edit View Favorites Tools Help  
 Links Customize Links  
 Microloan Application

Skip Navigation Accessibility Options  
**TEST** MicroLoan Search Exit Help

Expand Collapse

- Lender Portfolio
  - Lender Detail
  - Loan Search
  - Borrower Search
- Portfolio Status
  - Snapshot Summary
  - Update Portfolio
  - Snapshot Detail
  - CO/PIF Loans
- Intermediary Dashboard
  - Manage Participants
  - Manage TA / Training
    - Enter TA Data

*18933	Robert Redford	30 <input checked="" type="radio"/>	60 <input type="radio"/>	90 <input type="radio"/>	120 <input type="radio"/>	DEF <input type="radio"/>	PIF <input type="radio"/>	CO <input type="radio"/>	\$40,000.00	<input type="checkbox"/>
*18934	Rob Redford	30 <input checked="" type="radio"/>	60 <input type="radio"/>	90 <input type="radio"/>	120 <input type="radio"/>	DEF <input type="radio"/>	PIF <input type="radio"/>	CO <input type="radio"/>	\$40,000.00	<input type="checkbox"/>
*18935	John Business	30 <input checked="" type="radio"/>	60 <input type="radio"/>	90 <input type="radio"/>	120 <input type="radio"/>	DEF <input type="radio"/>	PIF <input type="radio"/>	CO <input type="radio"/>	\$25,000.00	<input type="checkbox"/>
*18936	Robert Bruce	30 <input checked="" type="radio"/>	60 <input type="radio"/>	90 <input type="radio"/>	120 <input type="radio"/>	DEF <input type="radio"/>	PIF <input type="radio"/>	CO <input type="radio"/>	\$4,000.00	<input type="checkbox"/>
18942	John Doe	30 <input checked="" type="radio"/>	60 <input type="radio"/>	90 <input type="radio"/>	120 <input type="radio"/>	DEF <input type="radio"/>	PIF <input type="radio"/>	CO <input type="radio"/>	\$3,000.00	<input type="checkbox"/>
18948	Hello Hello	30 <input checked="" type="radio"/>	60 <input type="radio"/>	90 <input type="radio"/>	120 <input type="radio"/>	DEF <input type="radio"/>	PIF <input type="radio"/>	CO <input type="radio"/>	\$1,000.00	<input type="checkbox"/>
18945	John Business	30 <input checked="" type="radio"/>	60 <input type="radio"/>	90 <input type="radio"/>	120 <input type="radio"/>	DEF <input type="radio"/>	PIF <input type="radio"/>	CO <input type="radio"/>	\$2,345.00	<input type="checkbox"/>
18946	John Doe	30 <input checked="" type="radio"/>	60 <input type="radio"/>	90 <input type="radio"/>	120 <input type="radio"/>	DEF <input type="radio"/>	PIF <input type="radio"/>	CO <input type="radio"/>	\$1,200.00	<input type="checkbox"/>
18947	Dave Ritter	30 <input checked="" type="radio"/>	60 <input type="radio"/>	90 <input type="radio"/>	120 <input type="radio"/>	DEF <input type="radio"/>	PIF <input type="radio"/>	CO <input type="radio"/>	\$50,000.00	<input type="checkbox"/>
18950	Jay P Morgan	30 <input checked="" type="radio"/>	60 <input type="radio"/>	90 <input type="radio"/>	120 <input type="radio"/>	DEF <input type="radio"/>	PIF <input type="radio"/>	CO <input type="radio"/>	\$48,000.00	<input type="checkbox"/>

\*\* and grey background indicates that this loan has not been updated for over 30 days.

Submit

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 Session timeout in 48 minutes.

Local intranet 100%

Jay P Morgan paid \$2000  
 Loan Payments = Current  
 Balance = \$48,000



---

# Have All Borrowers Have Been Updated?

# Update Every Loan Record in MPERs

---

- Every active microloan must be updated
- Gray shaded records = not updated
- When you finish the portfolio update,  
Only PIF RECORDS WILL BE GRAY  
If other records are Gray, you are not finished.

# Example Update Portfolio Screen

*18933	Robert Redford	30 <input checked="" type="radio"/>	60 <input type="radio"/>	90 <input type="radio"/>	120 <input type="radio"/>	DEF <input type="radio"/>	PIF <input type="radio"/>	CO <input type="radio"/>	\$40,000.00
*18934	Rob Redford	30 <input checked="" type="radio"/>	60 <input type="radio"/>	90 <input type="radio"/>	120 <input type="radio"/>	DEF <input type="radio"/>	PIF <input type="radio"/>	CO <input type="radio"/>	\$40,000.00
*18935	John Business	30 <input checked="" type="radio"/>	60 <input type="radio"/>	90 <input type="radio"/>	120 <input type="radio"/>	DEF <input type="radio"/>	PIF <input type="radio"/>	CO <input type="radio"/>	\$25,000.00
*18936	Robert Bruce	30 <input checked="" type="radio"/>	60 <input type="radio"/>	90 <input type="radio"/>	120 <input type="radio"/>	DEF <input type="radio"/>	PIF <input type="radio"/>	CO <input type="radio"/>	\$4,000.00
*18942	John Doe	30 <input checked="" type="radio"/>	60 <input type="radio"/>	90 <input type="radio"/>	120 <input type="radio"/>	DEF <input type="radio"/>	PIF <input type="radio"/>	CO <input type="radio"/>	\$3,000.00
18948	Hello Hello		60 <input type="radio"/>	90 <input type="radio"/>	120 <input type="radio"/>	DEF <input type="radio"/>	PIF <input type="radio"/>	CO <input type="radio"/>	\$1,000.00
18945	John Business	30 <input checked="" type="radio"/>	60 <input type="radio"/>	90 <input type="radio"/>	120 <input type="radio"/>	DEF <input type="radio"/>	PIF <input type="radio"/>	CO <input type="radio"/>	\$2,345.00
		<input checked="" type="radio"/>	60 <input type="radio"/>	90 <input type="radio"/>	120 <input type="radio"/>	DEF <input type="radio"/>	PIF <input type="radio"/>	CO <input type="radio"/>	\$1,200.00
		<input checked="" type="radio"/>	60 <input type="radio"/>	90 <input type="radio"/>	120 <input type="radio"/>	DEF <input type="radio"/>	PIF <input type="radio"/>	CO <input type="radio"/>	\$50,000.00
		<input checked="" type="radio"/>	60 <input type="radio"/>	90 <input type="radio"/>	120 <input type="radio"/>	DEF <input type="radio"/>	PIF <input type="radio"/>	CO <input type="radio"/>	\$50,000.00

*Gray = Not Updated*  
*NO Gray Shaded Records*  
*You are not finished yet.*



# Deferred Payment Arrangements

- No change to the principal balance?  
An explanation must be included with the  
“no change certification”

The screenshot shows the SBA Microloan application interface. The main content area displays a table of microloans for SBA Loan # 41497240. The table has columns for Loan Seq #, Borrowers, and various status indicators (0, 1, 30, 60, 90, 120, DEF, PIF, CO). The 'Outstanding Principal Balance' and 'No Chg' columns are highlighted. A callout box points to the 'No Chg' column.

Loan Seq #	Borrowers	0	1	30	60	90	120	DEF	PIF	CO	Outstanding Principal Balance	No Chg
TOTALS: 3		0	31	0	61	91	0	over 120/ Def			\$45,123.00	0
*18878	QA Test Borrower	30	60	90	120	DEF	PIF	CO			\$32,123.00	<input checked="" type="checkbox"/>
*18881	test	30	60	90	120	DEF	PIF	CO			\$13,000.00	<input type="checkbox"/>
*18879	QA Test Borrower	30	60	90	120	DEF	PIF	CO			\$0.00	<input type="checkbox"/>

No Change



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 https://enile.sba.gov/microloan/dsp\_welcome.cfm

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Microloan Application

Skip Navigation Accessibility Options  
 Search Exit Help

**TEST** MicroLoan

Expand Collapse

- Lender Portfolio
  - Lender Detail
  - Loan Search
  - Borrower Search
- Portfolio Status
  - Snapshot Summary
  - Update Portfolio
  - Snapshot Detail
  - CO/PIF Loans
- Intermediary Dashboard
  - Manage Participants
  - Manage TA / Training
    - Enter TA Data

Reasons for No Change Certification				
SBA Seq #	Borrowers	Status	Outstanding Principal Balance	No Change Comment
18878	QA Test Borrower	Delinquent (31 - 60 days)	\$32,123.00	Deferred Payment plan agreed and signed 3/1/2012

Submit

Last modified: 10/06/2011 12:00:00 AM SBA Processing: 0.141 seconds

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Session timeout in 60 minutes.

Local intranet 100%

Reason for  
"No Change"



# Record All Charge Offs

- Any microloan with an uncured default of > than 120 days - must be charged off in MPERS
- Charged Off totals are not included in the Outstanding Principal Balance

1	1	\$12,000.00
PIF	CO	Outstanding Principal Balance
PIF <input type="radio"/>	CO <input checked="" type="radio"/>	\$32,123.00
PIF <input type="radio"/>	CO <input type="radio"/>	\$12,000.00
PIF <input checked="" type="radio"/>	CO <input type="radio"/>	\$0.00

# Example: Updated Portfolio Complete

Microloan Principal Balance Outstanding

SBA Loan Number:

Page Number 1 of 1.

## Microloans for SBA Loan # 12345678

TOTALS: 12		6	4	1	0	0	1	0	\$276,500.00	1
Loan Seq #	Borrowers	0 to 30	31 to 60	61 to 90	91 to 120	over 120/ Def	PIF	CO	Outstanding Principal Balance	No Chg
18843	QA Test Borrower	30 <input type="radio"/>	60 <input type="radio"/>	90 <input checked="" type="radio"/>	120 <input type="radio"/>	DEF <input type="radio"/>	PIF <input type="radio"/>	CO <input type="radio"/>	\$25,000.00	<input type="checkbox"/>
18844	QA Test Borrower	30 <input checked="" type="radio"/>	60 <input type="radio"/>	90 <input type="radio"/>	120 <input type="radio"/>	DEF <input type="radio"/>	PIF <input type="radio"/>	CO <input type="radio"/>	\$24,000.00	<input type="checkbox"/>
18851	QA Test Borrower	30 <input checked="" type="radio"/>	60 <input type="radio"/>	90 <input type="radio"/>	120 <input type="radio"/>	DEF <input type="radio"/>	PIF <input type="radio"/>	CO <input type="radio"/>	\$23,000.00	<input type="checkbox"/>
18852	QA Test Borrower	30 <input type="radio"/>	60 <input type="radio"/>	90 <input type="radio"/>	120 <input type="radio"/>	DEF <input type="radio"/>	PIF <input checked="" type="radio"/>	CO <input type="radio"/>	\$0.00	<input type="checkbox"/>
18854	qa test	30 <input type="radio"/>	60 <input checked="" type="radio"/>	90 <input type="radio"/>	120 <input type="radio"/>	DEF <input type="radio"/>	PIF <input type="radio"/>	CO <input type="radio"/>	\$35,000.00	<input type="checkbox"/>
18857	QA Test Borrower	30 <input type="radio"/>	60 <input checked="" type="radio"/>	90 <input type="radio"/>	120 <input type="radio"/>	DEF <input type="radio"/>	PIF <input type="radio"/>	CO <input type="radio"/>	\$35,000.00	<input type="checkbox"/>

Gray = OK for PIF Status



On the Update Portfolio Screen  
 The Outstanding Principal balance is the amount to enter on the  
 MRF/ LLRF Reconciliation each quarter.

Must Match EXACTLY. There are no reconciling items.

Program Start Dt:	09/02/1993	Program End Dt:	03/30/2004
Cumulative Net Default Rate:	4.27%	Total Dollars Loaned :	1,735,724.32
SBA Loan Number:		12106340	Retrieve

Page Number 1 of 1.

Microloans for SBA Loan # 12106340

TOTALS: 32		25	1	1	0	0	4	1	\$400,700.00	0
Loan Seq #	Borrowers	0 to 30	31 to 60	61 to 90	91 to 120	over 120/ Def	PIF	CO	Outstanding Principal Balance	No Chg
*18903	Robert Bruce	30 <input type="radio"/>	60 <input type="radio"/>	90 <input type="radio"/>	120 <input type="radio"/>	DEF <input type="radio"/>	PIF <input checked="" type="radio"/>	CO <input type="radio"/>	\$0.00	<input type="checkbox"/>
*18917	John Doe	30 <input type="radio"/>	60 <input type="radio"/>	90 <input type="radio"/>	120 <input type="radio"/>	DEF <input type="radio"/>	PIF <input checked="" type="radio"/>	CO <input type="radio"/>	\$0.00	<input type="checkbox"/>
*18918	Walter Wade	30 <input type="radio"/>	60 <input type="radio"/>	90 <input type="radio"/>	120 <input type="radio"/>	DEF <input type="radio"/>	PIF <input checked="" type="radio"/>	CO <input type="radio"/>	\$0.00	<input type="checkbox"/>
*18919	Rosie Smith	30 <input type="radio"/>	60 <input type="radio"/>	90 <input type="radio"/>	120 <input type="radio"/>	DEF <input type="radio"/>	PIF <input type="radio"/>	CO <input checked="" type="radio"/>	\$14,950.00	<input type="checkbox"/>
*18925	John Business	30 <input checked="" type="radio"/>	60 <input type="radio"/>	90 <input type="radio"/>	120 <input type="radio"/>	DEF <input type="radio"/>	PIF <input type="radio"/>	CO <input type="radio"/>	\$19,500.00	<input type="checkbox"/>



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---

**After every borrower is updated for every SBA loan, you are ready to.....**



---

## Prepare the MRF LLRF Quarterly Report