

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

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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](#)

> FirstGov > E-Gov > Regulations.gov > White House
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Start My Computer Microloan ... Microloan Pr... untitled - Paint Paint Document1 ... I.R.I.S. 4:30 PM

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

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Microloan Application

Skip Navigation Accessibility Options

TEST MicroLoan Search Exit Help

Expand Collapse

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 - 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:

--Select--

Cancel Submit

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

Choose Borrower from TA Participant list

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The screenshot shows a web browser window with the URL <https://enile.sba.gov/micro>. The page title is "Microloan Application - Microsoft Internet Explorer". The browser's address bar shows "Live Search". The page content includes a "TEST MicroLoan" header and a navigation menu on the left with options like "Lender Portfolio", "Loan Search", and "Borrower Search". A dropdown menu is open, listing various borrower names such as "Bruce, Robert (Gedup)", "Doe, John (John Doe Biz)", and "Ups, Dan (Dan's Racing)". A callout box points to the "Ups, Dan (Dan's Racing)" entry with the text: "If the desired participant is not in the list above, please Enter their TA Pre Loan intake information to add them to the list now." The footer contains navigation links like "> FirstGov > E-Gov > Regulations.gov > White House" and a "Session timeout in 59 minutes" warning.

If the desired participant is not in the list above, please

Enter their TA Pre Loan intake information to add them to the list now.

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Microloan Application

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Choose [add the participant](#) first

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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:

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Enter required data into all blue highlighted boxes.

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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
New New	NEW	Lee Rd, FAIRFAX, VA 22031	Palley, Saritha	03/28/2012	Palley, Saritha	03/28/2012
Hello Hello	Hello	Hello Ct, HERNDON, VA 20171	Palley, Saritha	02/29/2012	Palley, Saritha	03/28/2012

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Participant Demographics

First Name: **Phone Number:** Ex. 704-344-6640

Middle Name: **Fax Number:** Ex. 704-344-6640

Last Name: **Email Address:**

Zip+4 Code:

Street Address:

City Name:

State:

Borrower: No

EIN:

Intake Date:

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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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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

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Links Customize Links

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Search Exit Help

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

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New Participant

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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 Clear

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

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[Add New Loan](#)

Loan Seq#	Closing Dt	Loan Status	Loan Amount	Lender's Loan	C/I	Borrower
18949	07/07/10	Current (30 days & under)	\$1,000.00	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
18935	01/17/12	Current (30 days & under)	\$25,000.00	abc1234	C	John Business
18934	02/03/11	Current (30 days & under)	\$40,000.00	helloloan2	C	Rob Redford
18933	02/04/11	Current (30 days & under)	\$40,000.00	helloloan1	C	Robert Redford

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

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Click on
Add New Loan

Microloan Application - Microsoft Int...

https://enile.sba.gov/micro...

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Customize Links

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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 of (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)

Put to:

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

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

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 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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Fill in all Required Fields

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TEST MicroLoan Search Exit Help

Loan Detail

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Expand Collapse

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Loan Seq Nmb: **New**

Loan Purpose: **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: **Great Development Corp**

Status:

Closing Dt:

Interest Rate:

Jobs Created:

Jobs Retained:

Maturity Mos:

Fill in Loan Details

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

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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
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100%

Choose Ethnicity and Veteran Status from Drop Down boxes

Choose Race by clicking in the boxes

Click Save

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TEST MicroLoan

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

Expand | Collapse

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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**

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

NAICS Code: **213115**

Materials Equipment
 Supplies Inventory
 Working Capital

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

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

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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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
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 - Manage Participants
 - Manage TA / Training
 - Enter TA Data

Microloans

Add New Loan

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

* 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

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

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

Click on Update Portfolio

					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%

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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

10003440
35816550
38412540
41497240
10005240
10007740
56846530
12345678
99455030
17605340
04664000
12106340

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Session timeout in 60 minutes

Local intranet 100%

Choose SBA Loan from list
Click on
Retrieve

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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: _____ State: _____ 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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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
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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
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 - 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

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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

- 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 Busin	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”

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https://enle.sba.gov/microloan/dsp_welcome.dm

TEST MicroLoan Search Exit Help

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: 41497240 Retrieve

Page Number 1 of 1.

Microloans for SBA Loan # 41497240

Loan Seq #	Borrowers	1 to 30	31 to 60	61 to 90	91 to 120	over 120/ Def	PIF	CO	Outstanding Principal Balance	No Chg
TOTALS: 3		0	31	0	0	0	1	0	\$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"/>

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

Submit

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Session Timeout in 55 minutes

No
Change

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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
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 - 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 :	7,735,724.32
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