



## New LoanList Enhancements for User Interface, Excel Download & API

**LoanLIST** is a secondary market application that allows stakeholders to research loan information and payment history. The application provides up-to-date loan and payment data to enable users to perform their business procedures, e.g., Pooling, Asset Sale.

Effective **February 19, 2026**, several LoanLIST enhancements will be available in production, including updates to the **user interface (UI)**, **Excel download**, and **LoanLIST API version 3**. These enhancements are designed to increase stakeholder transparency, support reconciliation and forecasting activities, and improve historical payment tracking.

### Summary of Enhancements

The following updates have been implemented across the UI, Excel download, and API.

#### ***New Data Fields Added***

- SBA Approval Date
- Geography Street
- Loan Status
- Loan Status Date
- Loan Payoff Type
- Pool Number
- Pool Issue Date

#### ***Formatting Update***

- **GP Number** has been renamed to **SBA Loan Number**

#### ***Payment History***

- **Payoff Amount added to Payment History table**
  - Payoff details are available for loans paid off beginning **November 2023**
- Balance discrepancies related to full prepayments are now flagged as **“Post Payoff Reconciliation”**

#### ***API and Excel Download***

- Increased the maximum number of loans per API call to **1,000 loans** to reduce the number of required API calls
- New fields added:
  - Gross Margin % PTD
  - Net Margin % as of PTD
- **Payment Frequency** repositioned next to **Adjustment Frequency**
- Updated download to latest Excel version

### ***User Interface***

Messages covered by the new Loan Payoff Type and Pool fields have been removed from the UI:

- “This loan is in an SBA Pool”
- “This loan was paid off”
- “This loan was in an SBA Pool and is paid off”

These messages will continue to appear in the Excel download and API

The new **LoanLIST API version 3** will not be mandatory upon release to production. Users may continue to use LoanLIST API version 2 without interruption. If version 3 becomes mandatory in the future, advance communication will be provided.

### **Access Requirements**

To access LoanLIST, users must have an active **Capital Access Financial System (CAFS)** account with one of the following roles:

- Lender
- Originator
- Secondary Market
- Financial Reporting

For API access, please refer to the **API specifications** found [here](#). Version 3 specifications will be available on February 19<sup>th</sup>.

## **Questions**

For questions or concerns relating to this matter, please contact the FTA Client Service Team at [fta@sba.gov](mailto:fta@sba.gov) or via the toll-free hotline at (877) 470-0722, Option 2.