



U.S. Small Business
Administration

Release Notes

1502 Reporting in the MySBA Lender Portal

Version #2.6

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Enhancements

Consolidated “Loan Batches” Page

The “Make Payment to FTA” and “Loan Batches” pages have now been consolidated into one new “Loan Batches” page. On the new page, batches are organized into tabs based on status.

As part of this update, the pop-up messages have been updated to better guide users through the “Submit & Pay” step.

Note for “lender service providers” (LSPs) that prepare reporting on behalf of the lender: LSP user batches with \$0 due will now also require *the lender user* to take the final step of submitting the batch (just like with batches with a positive amount due).

Updated “Server Error” Message

Previously, there were some server errors which displayed lines of system code to the user. Now, users will see updated user-friendly messaging that directs them to reach out for assistance in these cases.

Updated Handling of Error #1004 and #4011

For Error #1004, a message will notify the user that they must report an “Interest Period To Date” if they are reporting their first disbursement.

For Error #4011, a message will notify the user that they must report a date of first disbursement in ETRAN. This applies for revolver loans as well.

Updated Error #4042 Message

The warning message for Error #4042 has been updated so that users are informed that the amount undisbursed will automatically be defaulted to zero if they do not report a disbursement that brings the amount undisbursed to zero. This only applies when the amount undisbursed is greater than zero and it is the last reporting period within the disbursement period for the loan.

Resolved Issues

We continue to make improvements to the 1502 reporting experience. The following updates are included with this release version. Some of these issues only affected specific users or specific loan numbers.

INCORRECT GUARANTY CONVERSION FOR REPURCHASED LOANS FROM THE PORTAL TO GATEWAY

For sold loans, the system is now using the proper SBA Guaranty percentage amount for lender repurchase scenarios. This applies when the user changes the SBA Guaranty percentage so the correct amount will be sent to the Gateway and ETRAN.

ERROR #4024 DESCRIPTION DOES NOT DISPLAY

When a user updates the amount disbursed field to a blank or non-numeric value, SBA Error #4024 will now display and prompt the user to correct it.

SBA FEE OVERPAYMENT EXCEL EXPORT SHOWING AN ADDITIONAL SBA ONGOING SERVICE FEE COLUMN

Under the “Statements and Documents” section in MySBA Portal, the “SBA Fee Overpayment Statement” Excel export is now only showing the SBA Ongoing Servicing Fee Rate in Column G.

UNABLE TO BATCH OVER 200 LOANS FROM THE QUEUE WHEN FILTERS ARE SELECTED

When the user selects all loans in the queue and creates a batch, all loans that fall within the selected filter criteria will be batched even if there are more than 200 loans. The filters can be applied to queue status, reporting type, loan payment status, or loan type.

FALSE-POSITIVE ERROR FLAGGED ON ACTIVE LOANS FOR SOME USERS

Active loans are no longer being flagged as inactive with Error #0013.

