



U.S. Small Business
Administration

Release Notes

1502 Reporting in the MySBA Lender Portal

Version #2.8

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Enhancements

Batch Status Reflects As “Paid” Once Payoff Is Completed

When a payoff payment is received and matched, the system recognizes the “Paid” status returned by the 1502 Gateway. Batches are updated to a “Paid” status to give users accurate confirmation that their payoff has completed.

Align Unsold Fee Calculation With 1502 Gateway

The fee calculation for unsold term loans with remaining undisbursed amounts is aligned with data in the 1502 Gateway, using the guaranteed interest amount rather than potentially mismatched opening balances. Users will see consistent fee amounts across the portal and Gateway, reducing reconciliation issues when reporting unsold loans.

Default Amount Undisbursed to \$0 After the Disbursement Deadline Date

The amount undisbursed is defaulted to \$0 anytime after the 48th month disbursement period or disbursement deadline date. This reduces discrepancies caused by reporting an amount undisbursed after all funds are required to be disbursed.

Select All Export Update

Select All functionality has been improved, allowing for better data table exports. Select All now recognizes applied filters for visible on-screen table data AND data non-visible (on another table-page). Users can more efficiently download a complete and accurate export file in one step without paging through filtered table results. This applies to exports from the following data tables:

- Unreported Loans
- Loans with Errors
- Loans Missing from Queue
- Loan Batches
- Ready to Submit & Pay

Select All to Create Batch Update

When users Select All loans and Create Batch, the system analyzes the selected loans and displays a



confirmation modal based on the loan types selected. Users receive clear and consistent guidance about the batch being created with any notices about queue status and reporting type.

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.

GUARANTEED PRINCIPAL AMOUNT ROUNDING

The system sends the same guaranteed principal amount downstream that is displayed in the portal, eliminating potential rounding mismatches. Funds will no longer be incorrectly routed to suspense, reducing manual payment corrections and delays.

ANNUAL SERVICING FEE INVOICES LATEST PAYMENT

Invoice display logic was updated to more accurately display the most recent invoice date rather than showing repeated historical invoice entries.

AUDIT LOG TO NOT SHOW DIFFERENT USER EDITS UNDER THE SAME LOCATION

Audit log was corrected to ensure users can only view and edit loans associated with their own location and permissions. Users can be confident that loan data is protected and cannot be modified by unauthorized parties.

AMOUNT DUE TO FTA DISPLAYING IN LOANS REPORTED SECTION

The Loans Reported section accurately reflects all fees due, including annual servicing fees, without splitting or zeroing valid amounts.

BATCHED DATE AND TIME ZONE ALIGNMENT

Under the loan batches page, the date batched and submitted date will remain consistent across time zones.

LOANS REPORTED EXPORT BATCH RECORDS

The Loans Reported Excel export only includes loans that belong to the selected batch and complies with any on-screen filters, for users to reconcile batch totals.