



# SBA Information Notice

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**TO:** All SBA Employees, Certified Development Companies (CDCs), and 7(a) Lenders

**CONTROL NO.:** 5000-180007

**EFFECTIVE:** 6-28-2018

**SUBJECT:** Updates to Lender Portal

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The U.S. Small Business Administration (SBA) is updating the Office of Credit Risk Management's (OCRM's) Lender Portal for 7(a) Lenders and Certified Development Companies. In addition to the loan and performance information currently provided, the updated Lender Portal will provide lenders with supplementary quantitative information and analyses used by OCRM for oversight and monitoring.

The key additions to the Lender Portal are specific to each lender and are as follows:

- 2-Year trendlines for PARRiS/SMART metrics<sup>1</sup>;
- Concentration tables for industry segments, franchises, and geographic lending area;
- Number of loans and/or dollars associated with performance measures;
- Vintage year analysis of loan disbursements;
- Loan status analysis by delivery method;
- Form 172 payment information (7(a) only); and,
- Four additional PARRiS Flags (7(a) only)<sup>2</sup>.

Functionality such as hover-over definitions, ability to download loan and lender level data to Microsoft Excel, printer-friendly portal snapshots, and the ability to see trends over time will remain available via the portal. This Lender Portal update will increase a lender's ability to proactively monitor the performance of its SBA loan portfolio.

SBA reserves the right to update the Lender Portal information at any time and at its discretion. All data displayed on the Lender Portal are Confidential Information under 13 CFR §120.1060 and accordingly, the confidentiality and disclosure prohibition provisions of 13 CFR §120.1060 apply.

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<sup>1</sup> These trendlines are based on quarterly data.

<sup>2</sup> The new PARRiS flags include: (1) last 12-month new business rate (loan approval dollars to businesses that are 2 years of age or less); (2) last 12-month small loan rate (loan approval dollars to loans ≤ \$350,000); (3) last 12-month export rate (loan approval dollars to businesses that export); and (4) last 12-month accommodation industry rate (loan approval dollars to businesses in NAICS subsector code 721 – Accommodation).

Questions about this Lender Portal update may be directed to Susan Streich, Director, Office of Credit Risk Management at [lender.oversight@sba.gov](mailto:lender.oversight@sba.gov).

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