PRS 7.0: Seller/Servicer User Guide
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Introduction

Welcome

Freddie Mac's Property Reporting System (PRS) is a central location for Freddie Mac's Servicers to report property or loan level updates for each of its multifamily loans: Provides a pipeline of property Assessments and Loan Compliance item requirements. Servicers are able to upload required templates, supporting documentation, and provide updates directly into PRS. .

Loan Management, Inspection, Annual Financial, Quarterly Financial and Financial Statements and Rent Rolls submission move through the following workflow statuses:

1. **Due**: Assessment is due from Seller/Servicer
2. **Suspended**: Assessment is currently suspended
3. **Waived**: Assessment has been waived by Freddie Mac
4. **Completed**: Assessment and Required Attachments have been submitted and validated by PRS. Assessments will remain available to be updated by the Seller/Servicer for 5 days.
5. **Accepted**: Assessment has been accepted by Freddie Mac, can be viewed/downloaded from within the system, but can no longer be submitted by the Seller/Servicer

Loan Compliance Items move through the following Workflow statuses:

1. **Due**: Update is due from Seller/Servicer
2. **SSR Review/Update**: Seller/Servicer review, provide update and send item to Freddie Mac for Review
3. **FM Under Review**: Freddie Mac reviews item and return item back to due status or mark item as completed
4. **Completed**: Status is updated to Completed
Getting Started

System requirements

Computer/Processor

- Computer with a 233 megahertz (MHz) processor or higher (Pentium processor recommended) Operating System
- Windows 7
- Windows XP 32-bit with Service Pack 2 (SP2) or higher
- Windows XP Professional x64 Edition
- Windows Vista 32-bit
- Windows Vista 64-bit
- Windows Vista with Service Pack 1 (SP1) or higher
- Windows Server 2003 32-bit with Service Pack 2 (SP2) or higher
- Windows Server 2003 64-bit with Service Pack 2 (SP2) or higher
- Windows Server 2008 32-bit or higher
- Windows Server 2008 64-bit or higher
- Internet Explorer v9 or higher

Memory

- Windows 7 - 128MB
- Windows XP 32-bit with Service Pack 2 (SP2) or higher - 64 MB
- Windows XP Professional x64 Edition - 128 MB
- Windows Vista 32-bit - 512 MB
- Windows Vista 64-bit - 512 MB
- Windows Server 2003 32-bit with Service Pack 2 (SP2) or higher - 64 MB
- Windows Server 2003 64-bit with Service Pack 2 (SP2) or higher - 128 MB
- Windows Server 2008 32-bit - 512 MB
- Windows Server 2008 64-bit - 512 MB

Hard Disk Space
- Windows 7 - 150MB
- Windows XP 32-bit with Service Pack 2 (SP2) or higher - 150 MB
- Windows XP Professional x64 Edition - 200 MB
- Windows Vista 32-bit - 70 MB
- Windows Vista 64-bit - 120 MB
- Windows Server 2003 32-bit with Service Pack 2 (SP2) or higher - 150 MB
- Windows Server 2003 64-bit with Service Pack 2 (SP2) or higher - 200 MB
- Windows Server 2008 32-bit - 150 MB
- Windows Server 2008 64-bit - 200 MB

Drive
- CD-ROM drive (if installation is done from a CD-ROM)

Display
- Super VGA (800 x 600) or higher-resolution monitor with 256 colors

Peripherals
- Modem or Internet connection
- Microsoft Mouse, Microsoft IntelliMouse, or compatible pointing device

**Log In**

You must have a valid PRS user account to access the PRS application.

Log In to PRS

Welcome to the Property Reporting System (PRS). To access the system, enter your user id and password in the spaces provided. Use of this system is governed by the Freddie Mac Multifamily Seller/Servicer Guide.

User ID

Password

LOGIN

Forgot Password
Upload Files

How to Upload one or more files

To upload one or more Assessment or Attachment files, perform the following functions:

1. On the Main Menu, go to the Upload drop down menu and select "Upload Individual Files".

![Image showing the Upload Individual Files option]

2. This will open the "Assessments and Attachments" upload page.

3. On the menu, click on the blue UP arrow (Upload Files).

![Image showing the Upload Files window]

4. The Upload Files window will pop-up.
5. Click "Add..."
6. The Select Files window will popup.

7. Navigate to the appropriate folder and select the files you wish to upload and click Open. You may select one or more files for upload.

8. The file(s) you selected will appear in the Upload Files window. If you would like to add more files, repeat steps 3 through 5. If you would like to clear a file, right-click on that file and select "Clear".

9. Once you are ready to complete the upload, click "Upload".

10. Your documents will be immediately processed by the system.
   - If successful, the documents will be immediately moved to the proper Assessment folder and will not appear on this page.
   - If unsuccessful, the files will remain on this page and will be added to the Upload Failures list (accessible by clicking the "View Upload Failures" button below the document window, which provides feedback on the reason for failure. Failures must be corrected and re-uploaded.

    **Upload Failures Pop Up**

    ![Image of Upload Failures Window]

    In addition, when uploading an Inspection and/or CREFC form, users may be guided in the Upload failures screen to check the "Validation Failures" via the following message:

    *Invalid data found while processing the spreadsheet.* Please refer to Validation Failures
To view a file's specific validation failures, close the "Upload Failures" pop-up screen to return to the "Assessment and Attachment Uploads" screen. Then, click the "View Validation Failures" button at the bottom of the screen to pop-up the validation failures screen:

The Validation Failures screen shows each individual field-level validation that failed while attempting to upload the CREFC or Inspection form. Users can look at each validation failure and address each one in their source file, or click the "Output to Excel" button at the top of the Validation Failures display grid to export all validation failures to Microsoft Excel. Once in Excel, users can sort/filter as desired, while still addressing each validation failure in their source Inspection file. Once all validation failures are addressed, the file can be re-uploaded via the same procedures as described above.

Note: For the Assessment files to properly process in PRS, the document naming convention rules must be followed:

<table>
<thead>
<tr>
<th>Assessment Type</th>
<th>File Type</th>
<th>New Naming Convention 7/2017</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>A-CREFC-MF</td>
<td>Annual Multifamily (A-CREFC-MF)</td>
<td>xxxxxxxx_ACREFCMF_MMDDYY_SYYYY</td>
<td>xxxxxxxx = loan number; MMDDYY = due date of financials; YYYY = Submission Period</td>
</tr>
<tr>
<td>A-CREFC-MF</td>
<td>A-CREFC-MF - Other Attachments</td>
<td>xxxxxxxx_ACREFCMF_Mother_MMDDYY_SYYYY</td>
<td>xxxxxxxx = loan number; MMDDYY = due date of financials; YYYY = Submission Period</td>
</tr>
<tr>
<td>A-CREFC-MF</td>
<td>Bond ADS Supplemental Form</td>
<td>xxxxxxxx_ACREFCMF_BOND_MMDDYY_SYYYY</td>
<td>xxxxxxxx = loan number; MMDDYY = due date of financials; YYYY = Submission Period</td>
</tr>
<tr>
<td>A-CREFC-MF</td>
<td>Cooperative Assessment Supplemental Form</td>
<td>xxxxxxxx_ACREFCMF_Coop_MMDDYY_SYYYY</td>
<td>xxxxxxxx = loan number; MMDDYY = due date of financials; YYYY = Submission Period</td>
</tr>
<tr>
<td>A-CREFC-MF</td>
<td>Unstabilized Property Monitoring Form</td>
<td>xxxxxxxx_ACREFCMF_UMF_MMDDYY_SYYYY</td>
<td>xxxxxxxx = loan number; MMDDYY = due date of financials; YYYY = Submission Period</td>
</tr>
<tr>
<td>A-CREFC-MF</td>
<td>Bulk CREFC-MF</td>
<td>Bulk_MF</td>
<td>The Bulk MF template will need to created in the Macro Enabled file (.xlsm).</td>
</tr>
<tr>
<td>A-CREFC-HC</td>
<td>Annual Healthcare (A-CREFC-HC)</td>
<td>xxxxxxxx_ACREFCCHC_MMDDYY_SYYYY</td>
<td>xxxxxxxx = loan number; MMDDYY = due date of financials; YYYY = Submission Period</td>
</tr>
<tr>
<td>A-CREFC-HC</td>
<td>A-CREFC-HC - Other Attachments</td>
<td>xxxxxxxx_ACREFCCHC_Mother_MMDDYY_SYYYY</td>
<td>xxxxxxxx = loan number; MMDDYY = due date of financials; YYYY = Submission Period</td>
</tr>
<tr>
<td>A-CREFC-HC</td>
<td>Bond ADS Supplemental Form</td>
<td>xxxxxxxx_ACREFCCHC_BOND_MMDDYY_SYYYY</td>
<td>xxxxxxxx = loan number; MMDDYY = due date of financials; YYYY = Submission Period</td>
</tr>
<tr>
<td>A-CREFC-HC</td>
<td>Cooperative Assessment Supplemental Form</td>
<td>xxxxxxxx_ACREFCCHC_Coop_MMDDYY_SYYYY</td>
<td>xxxxxxxx = loan number; MMDDYY = due date of financials; YYYY = Submission Period</td>
</tr>
<tr>
<td>A-CREFC-HC</td>
<td>Unstabilized Property Monitoring Form</td>
<td>xxxxxxxx_ACREFCCHC_UMF_MMDDYY_SYYYY</td>
<td>xxxxxxxx = loan number; MMDDYY = due date of financials; YYYY = Submission Period</td>
</tr>
<tr>
<td>A-CREFC-HC</td>
<td>Bulk CREFC-HC</td>
<td>Bulk_HC</td>
<td>The Bulk HC template will need to completed in the Macro Enabled file (.xlsm).</td>
</tr>
<tr>
<td>Q-CREFC-MF</td>
<td>Quarterly CREFC - MF</td>
<td>xxxxxxxx_QCREFCMF_MMDDYY_SYYYYQn</td>
<td>xxxxxxxx = loan number; MMDDYY = due date of Q-CREFC - MF; YYYY = Submission Period Year; mQuarter(1,2 or 3)</td>
</tr>
<tr>
<td>Q-CREFC-MF</td>
<td>Q CREFC - MF - Other Attachments</td>
<td>xxxxxxxx_QCREFCMF_Mother_MMDDYY_SYYYYQn</td>
<td>xxxxxxxx = loan number; MMDDYY = due date of Q-CREFC - MF; YYYY = Submission Period Year; mQuarter(1,2 or 3)</td>
</tr>
<tr>
<td>Q-CREFC-MF</td>
<td>Bond ADS Supplemental Form</td>
<td>xxxxxxxx_QCREFCMF_BOND_MMDDYY_SYYYYQn</td>
<td>xxxxxxxx = loan number; MMDDYY = due date of financials; YYYY = Submission Period</td>
</tr>
<tr>
<td>Q-CREFC-MF</td>
<td>Cooperative Assessment Supplemental Form</td>
<td>xxxxxxxx_QCREFCMF_Coop_MMDDYY_SYYYYQn</td>
<td>xxxxxxxx = loan number; MMDDYY = due date of financials; YYYY = Submission Period</td>
</tr>
<tr>
<td>Q-CREFC-MF</td>
<td>Unstabilized Property Monitoring Form</td>
<td>xxxxxxxx_QCREFCMF_UMF_MMDDYY_SYYYYQn</td>
<td>xxxxxxxx = loan number; MMDDYY = due date of financials; YYYY = Submission Period</td>
</tr>
<tr>
<td>Q-CREFC-HC</td>
<td>Quarterly CREFC - HC</td>
<td>xxxxxxxx_QCREFCCHC_MMDDYY_SYYYYQn</td>
<td>xxxxxxxx = loan number; MMDDYY = due date of Q-CREFC - HC; YYYY = Submission Period Year; mQuarter(1,2 or 3)</td>
</tr>
<tr>
<td>Q-CREFC-HC</td>
<td>Q-CREFC - HC - Other Attachments</td>
<td>xxxxxxxx_QCREFCHC_Other_MMDDYY_SYYYYQn</td>
<td>xxxxxxxx = loan number; MMDDYY = due date of Q - CREFC - HC; YYYY = Submission Period Year; n=Quarter(1,2 or 3)</td>
</tr>
<tr>
<td>Q-CREFC-HC</td>
<td>Bond ADS Supplemental Form</td>
<td>xxxxxxxx_QCREFCHC_BOND_MMDDYY_SYYYYQn</td>
<td>xxxxxxxx = loan number; MMDDYY = due date of financials; YYYY = Submission Period</td>
</tr>
<tr>
<td>Q-CREFC-HC</td>
<td>Cooperative Assessment Supplemental Form</td>
<td>xxxxxxxx_QCREFCHC_Coop_MMDDYY_SYYYYQn</td>
<td>xxxxxxxx = loan number; MMDDYY = due date of financials; YYYY = Submission Period</td>
</tr>
<tr>
<td>Q-CREFC-HC</td>
<td>Unstabilized Property Monitoring Form</td>
<td>xxxxxxxx_QCREFCHC_ULM_MMDDYY_SYYYYQn</td>
<td>xxxxxxxx = loan number; MMDDYY = due date of financials; YYYY = Submission Period</td>
</tr>
<tr>
<td>Rent Roll</td>
<td>Rent Roll</td>
<td>xxxxxxxx_RR_MMDDYY</td>
<td>xxxxxxxx = loan number; MMDDYY = expected date of Rent Roll</td>
</tr>
<tr>
<td>Financial Statement</td>
<td>Borrower Operating Statement</td>
<td>xxxxxxxx_FS_MMDDYY</td>
<td>xxxxxxxx = loan number; MMDDYY = expected end date of Operating Statement</td>
</tr>
<tr>
<td>AIF</td>
<td>Inspection</td>
<td>xxxxxxxx_Inspection_MMDDYY_SYYYY</td>
<td>xxxxxxxx = loan number; MMDDYY = due date of Inspection; YYYY = Submission Period</td>
</tr>
<tr>
<td>AIF</td>
<td>Inspection - Photos Attachments</td>
<td>xxxxxxxx_AIF_Photos_MMDDYY_SYYYY</td>
<td>xxxxxxxx = loan number; MMDDYY = due date of Photo Attachment; YYYY = Submission Period</td>
</tr>
<tr>
<td>AIF</td>
<td>Inspection - Other Attachments</td>
<td>xxxxxxxx_AIF_Other_MMDDYY_SYYYY</td>
<td>xxxxxxxx = loan number; MMDDYY = due date of Inspection; YYYY = Submission Period</td>
</tr>
<tr>
<td>LMF</td>
<td>Loan Management</td>
<td>xxxxxxxx_LMGT_MMDDYY_SYYYY</td>
<td>xxxxxxxx = loan number; MMDDYY = due date of Inspection; YYYY = Submission Period Year</td>
</tr>
<tr>
<td>LMF</td>
<td>Bulk Loan Management</td>
<td>Bulk_LMGT</td>
<td>Excel File (.xls .xlsx, or .xlsm)</td>
</tr>
<tr>
<td>AIE</td>
<td>Annual Income and Expense (AIE)</td>
<td>xxxxxxxx_AIE_Form_MMDDYY_SYYYY</td>
<td>xxxxxxxx = loan number; MMDDYY = due date of financials; YYYY = Submission Period</td>
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<td>AIE - Other Attachments</td>
<td>xxxxxxxx_AIE_Other_MMDDYY_SYYYY</td>
<td>xxxxxxxx = loan number; MMDDYY = due date of financials; YYYY = Submission Period</td>
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<tr>
<td>AIE</td>
<td>Bulk AIE</td>
<td>Bulk_AIE</td>
<td>The Bulk AIE Template will need to be completed in the Macro Enabled file (.xls)</td>
</tr>
<tr>
<td>QIE</td>
<td>QIE - Quarterly Detailed/Abbreviated Income &amp; Expense</td>
<td>xxxxxxxx_QIE_Form_MMDDYY_SYYYYQn</td>
<td>xxxxxxxx = loan number; MMDDYY = due date of financials; YYYY = Submission Period Year, n = Quarter (1, 2 or 3)</td>
</tr>
<tr>
<td>QIE</td>
<td>QIE - Other Attachments</td>
<td>xxxxxxxx_QIE_Other_MMDDYY_SYYYYQn</td>
<td>xxxxxxxx = loan number; MMDDYY = due date of QIE; YYYY = Submission Period Year; n = Quarter (1, 2 or 3)</td>
</tr>
<tr>
<td>QIE</td>
<td>Bulk QIE</td>
<td>Bulk_QIE</td>
<td>The Bulk QIE Template will need to be completed in the Macro Enabled file (.xls)</td>
</tr>
</tbody>
</table>

If the proper file naming convention has not been followed, an upload error will be encountered and the Upload Failures page will provide error descriptions as shown below.

**How to Upload a Bulk File**

To upload a bulk Loan Management, Annual Financial or Quarterly Financial file (Excel format), perform the following functions:

1. On the Main Menu, go to the Upload drop down menu and select "Upload Assessment Bulk File".
2. This will take you to the Upload Bulk File page.

**Upload Bulk File**

This page is ONLY for upload of Bulk Data Excel files. Please DO NOT upload Assessment or Attachment files here.

3. Either the file path or click Select and locate your Excel file that is ready for upload. Once you have entered the path, click Submit.
   - The filename of any bulk file must begin with one of the following file naming convention prefixes:
     - a) Bulk_HC
     - b) Bulk_LMGT
     - c) Bulk_MF

4. The bulk file will upload and you will be provided with a report outlining any errors.

**Note:** Bulk Annual Financial and Quarterly Financial templates may be downloaded from the Blank Assessment Templates page of PRS under the Downloads on the main menu. The downloaded file will have an .xlsm (Microsoft Excel 2007) file extension which is necessary for all macros to work correctly during template completion.
Download Files

Download Blank Templates
To download one or more Assessment or Attachment files, perform the following functions:

1. On the Main Menu, go to the “Download” drop down menu and select “Blank Assessment Templates”.

![Blank Assessment Templates](image1)

2. The following page will appear with the latest Assessment templates for download.

<table>
<thead>
<tr>
<th>Name</th>
<th>Size</th>
<th>Type</th>
<th>Date Modified</th>
</tr>
</thead>
<tbody>
<tr>
<td>Annual Income and Expense_BTL_v2</td>
<td>1.63 MB</td>
<td>XLSM File</td>
<td>1/1/2012 3:35 PM</td>
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<tr>
<td>Annual Income and Expense_v3.2012_Bank Form</td>
<td>292 KB</td>
<td>XLSM File</td>
<td>2/14/2017 8:43 AM</td>
</tr>
<tr>
<td>CREFC_HC_BTL_v1</td>
<td>1.64 MB</td>
<td>XLSM File</td>
<td>4/11/2016 9:50 AM</td>
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<tr>
<td>CREFG_MF_BTL_v1</td>
<td>1.08 MB</td>
<td>XLSM File</td>
<td>4/11/2016 9:49 AM</td>
</tr>
<tr>
<td>Loan Management_BTL_v2</td>
<td>384 KB</td>
<td>XLSM File</td>
<td>4/24/2014 11:41 AM</td>
</tr>
<tr>
<td>Loan Management_v5.2012_Bank Form</td>
<td>91 KB</td>
<td>XLSM File</td>
<td>1/27/2016 10:50 AM</td>
</tr>
<tr>
<td>Quarterly Income and Expense_BTL_v1</td>
<td>1.46 MB</td>
<td>XLSM File</td>
<td>5/7/2013 4:14 PM</td>
</tr>
<tr>
<td>Quarterly Income and Expense_v1</td>
<td>301 KB</td>
<td>XLSM File</td>
<td>1/19/2017 10:50 AM</td>
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<tr>
<td>PRS_HR_Aggregate</td>
<td>101 KB</td>
<td>XLSM File</td>
<td>12/10/2014 11:03 AM</td>
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<tr>
<td>PRS_HPL_Aggregate</td>
<td>11 KB</td>
<td>XLSM File</td>
<td>8/19/2016 12:01 PM</td>
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<tr>
<td>Value Add Loan Monitoring Report</td>
<td>253 KB</td>
<td>XLSM File</td>
<td>10/1/2013 2:00 PM</td>
</tr>
<tr>
<td>xxxxxxxxxx_CREFCHC_MMDDYY_SYYY</td>
<td>57 KB</td>
<td>XLSM File</td>
<td>6/24/2013 12:31 PM</td>
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<tr>
<td>xxxxxxxxxx_CREFCHC_MMDDYY_SYYY.png</td>
<td>53 KB</td>
<td>XLSM File</td>
<td>6/24/2013 12:31 PM</td>
</tr>
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<td>XLSM File</td>
<td>12/17/2010 9:18 AM</td>
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<tr>
<td>xxxxxxxxxx_CREFCHC_MMDDYY_SYYY_QX</td>
<td>57 KB</td>
<td>XLSM File</td>
<td>6/24/2013 12:31 PM</td>
</tr>
<tr>
<td>xxxxxxxxxx_CREFCHC_MMDDYY_SYYY_QX.png</td>
<td>53 KB</td>
<td>XLSM File</td>
<td>6/24/2013 12:34 PM</td>
</tr>
</tbody>
</table>

3. Right-click on the file you would like to download and select Download.

Download Documentation
To download the latest system documentation, perform the following functions:

1. On the Main Menu, go to the “Download” drop down menu and select “Documentation”.

![Documentation](image2)

2. The following page will appear with the latest system documentation available for download (specific filenames may vary).
<table>
<thead>
<tr>
<th>Name</th>
<th>Size</th>
<th>Type</th>
<th>Date Modified</th>
</tr>
</thead>
<tbody>
<tr>
<td>Freddie Mac User Guide</td>
<td>5.99 MB</td>
<td>PDF File</td>
<td>06/15/2012 2:29 PM</td>
</tr>
</tbody>
</table>
Download Pre-populated Templates

Pre-populated templates can be downloaded from the Due queue menus in the system.

To download an individual assessment:

1. On the Due queue grids, hover over the row of the particular Assessment
2. Right-click to open the Context menu
3. Select "Download Template"
4. A document interface window will open with the file you've requested ready for download

To download multiple assessments:

1. On the Due queue grids, select the desired Assessments by clicking the check-box next to each assessment that you'd like to download
2. On the Grid Menu, select "Download Selected Templates"
3. A document interface window will open with the files you've requested ready for download
4. Hold shift and select the requested files, then click the down-arrow to begin the download
The reports menu shows the list of available reports that can be previewed/printed.

<table>
<thead>
<tr>
<th>Available Reports</th>
<th>Output Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Data Warning Detail Report - Reserve Reporting</td>
<td>Excel</td>
</tr>
<tr>
<td>Data Warning Detail Report - Sales Data</td>
<td>Excel</td>
</tr>
<tr>
<td>Data Warning Summary Report - Reserve Reporting</td>
<td>Excel</td>
</tr>
<tr>
<td>Data Warning Summary Report - Sales Data</td>
<td>Excel</td>
</tr>
<tr>
<td>Late Assessments Report</td>
<td>Excel</td>
</tr>
<tr>
<td>Past Due Lit items</td>
<td>Excel</td>
</tr>
<tr>
<td>Return Report (New)</td>
<td>Excel</td>
</tr>
<tr>
<td>Risk Rating Report for Assessments</td>
<td>Excel</td>
</tr>
<tr>
<td>Seller Servicer Summary Report - Reserve Reporting</td>
<td>Excel</td>
</tr>
<tr>
<td>Seller Servicer Summary Report - Sales Data</td>
<td>Excel</td>
</tr>
<tr>
<td>Sum Reserve Reporting Report</td>
<td>Excel</td>
</tr>
<tr>
<td>Total Exposure by Institution Report</td>
<td>Excel</td>
</tr>
<tr>
<td>Validation Upload Error Report</td>
<td>Excel</td>
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<tr>
<td>Waive / Suspend Report</td>
<td>Excel</td>
</tr>
</tbody>
</table>
My Account

Change Password
To view or update your User Profile, perform the following functions:

1. On the Main Menu, go to the "My Account" drop down menu and select "Change Password".

   ![FreddieMac Property Reporting System]

2. Enter your current password, and new password twice. Click "Change Password"

Forgotten Password

1. Go to the Login page
2. Click **Forgot your password?**
3. Enter your username
4. Click **Change Forgotten Password**.
5. An email will be sent to the address associated with your account that includes a temporary password.
6. Use this temporary password to log into the system. If the temporary password is accepted, you will be immediately asked to provide a new password.

If you have forgotten your username or are unable to access your login page, please contact your administrator.
Home

S/S Overview

The Seller/Servicer Overview provides a summary of information regarding the Seller/Servicer, including any current/meaningful system notifications. Click Add New on the respective grid to add new Office Locations or Contacts.

S/S Pipeline Summary

The S/S Pipeline Summary provides a summary of the Assessment status totals by type, status and quarter.

In addition to the above, Quarterly Financial, Annual Financial, and Inspection pipelines would be shown below the Loan Management pipeline

Upload Failures

The Upload Failures page provides a list of uploads that have failed during the upload process, and includes a description of the error.

Validation Failures

The Validation Failures page provides a list of field-level validations that failed during Inspection or CREFC form upload process, and includes a description each validation failure.
Data Warnings

The Data Warnings screen allows Seller / Servicers to view individual file upload warnings generated by the system due to data discrepancies within the incoming assessment template vs. data that exists in PRS (by Assessment type). Users have the ability to add comments to a given warning for interaction with Freddie Mac.

Grid Menu Items (these apply to items selected on the Grid):

1. **Output To Excel**: Click this button to output the Grid to Excel
2. **Add Comments Bulk**: Click this button after selecting 1 or more warnings within the grid. Users will be presented with the following screen to enter a comment to all selected warnings in the "Add Comment" field:

   ![Add Comments Bulk](image)

   **Add/WarningComments(Bulk)**

<table>
<thead>
<tr>
<th>Freddie Mac Loan No.</th>
<th>S/S Loan No.</th>
<th>Company Name</th>
<th>Field Name</th>
<th>Assessment Type</th>
<th>Warning Details</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Demo Bank</td>
<td>Property Name</td>
<td>QIE</td>
<td>Invalid Property Name - varies from Loan Details Property Name</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Demo Bank</td>
<td>Property Name</td>
<td>AIF</td>
<td>Invalid Property Name - varies from Loan Details Property Name</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Demo Bank</td>
<td>Total Units</td>
<td>AIF</td>
<td>Invalid Total Units - varies from Loan Details Total Units</td>
</tr>
</tbody>
</table>

   **Add Comment**

   ![Add Comment](image)

Context Menu Items (these apply only to a single selected Assessment):

1. **View Seller/Servicer Details**: Opens a popup with details about the Seller/Servicer, including office locations and contacts
2. **View Loan Details**: Opens a popup with details about the Loan with which this Assessment is associated, including previous Assessments.

3. **View/Add Comments**: Opens the "Comments View/Add" pop-up screen where users can add a comment to the selected warning.
Assessment Queues

All Assessment Queues in the system use the Grid control. Basic functionality of the Grids is described in the Common Controls section of this User Manual. Functionality specific to each page is described below.

For your convenience, the Assessment Queues are grouped by Assessment Type (All, Loan Management, Quarterly Financial, Annual Financial, Inspection and Fin Stmt/Rent Roll). The All Assessments queue contains the same assessment from the subsequent queues.

1. **Due**: The Due queue includes all Assessments that are in Due status. This includes assessments that are due, late, don't have the necessary documentation, have been returned by Freddie Mac and have a Waiver or Extension request pending with Freddie Mac. The sub-statuses are indicated in the grid.

2. **Waived/Suspended**: The Waived queue includes all Assessments that have been waived or suspended by Freddie Mac.

3. **Complete**: The Complete queue includes Assessments that meet all submission requirements and are waiting to be finalized.

4. **Accepted**: The Accepted queue includes Assessments that are being reviewed by Freddie Mac. These assessments are no longer available for upload.

**All**

The All queue includes all Assessments regardless of its status.

Grid Menu Items (these apply to items selected on the Grid):

1. **Download Selected Templates**: To download multiple pre-populated templates, Select the Assessments using the checkbox, click the Download Assessment Templates and PRS will place a pre-populated version of the selected templates in a Document Interface popup window. To download these files as a zip, select all files, right-click and select "Download as Zip".

2. **Output To Excel**: Click this button to output the Grid to Excel

Context Menu Items (these apply only to a single selected Assessment):

1. **View Loan Details**: Opens a popup with details about the Loan with which this Assessment is associated, including previous Assessments

2. **Download Template**: To retrieve a pre-populated template for this Assessment, click this button and PRS will place the pre-populated version of the selected templates in a Document Interface popup window. To download this file, right click on it and select "Download".

3. **View Form**: To view the form on-screen, click View Form. This will open a popup window with the associated Assessment. Note: The Inspection form cannot be viewed on-screen due to the size of the...
4. **View Attachments:** To view the attachments, click View Attachments. Provides a popup with a Document Interface window to the documents (Attachments) for the Assessment. You cannot upload documents directly to this page, all uploads should be done through the Upload: Upload Individual Files item on the Main Menu.

**Due**

The Due queue includes all Assessments that are in Due status. This includes assessments that are due, late, don't have the necessary documentation, have been returned by Freddie Mac and have a Waiver or Extension request pending with Freddie Mac. The sub-statuses are indicated in the grid.

**Grid Menu Items (these apply to items selected on the Grid):**

1. **Download Selected Templates:** To download multiple pre-populated templates, Select the Assessments using the checkbox, click the Download Assessment Templates and PRS will place a pre-populated version of the selected templates in a Document Interface popup window. To download these files as a zip, selected all files, right-click and select "Download as Zip".
2. **Output To Excel:** Click this button to output the Grid to Excel

**Context Menu Items (these apply only to a single selected Assessment):**

1. **View Loan Details:** Opens a popup with details about the Loan with which this Assessment is associated, including previous Assessments
2. **Download Template:** To retrieve a pre-populated template for this Assessment, click this button and PRS will place the pre-populated version of the selected templates in a Document Interface popup window. To download this file, right click on it and select "Download".
3. **View Form:** To view the form on-screen, click View Form. This will open a popup window with the associated Assessment. Note: The Inspection form cannot be viewed on-screen due to the size of the form.
4. **View Documents:** Provides a popup with a Document Interface window to the documents (Assessments and Attachments) for the Assessment. You cannot upload documents directly to this page, all uploads should be done through the Upload: Upload Individual Files item on the Main Menu.
5. **Due Date Change Request:** If you would like to request a due date change for this Assessment: Click "Due Date Change Request", complete the pop-up and click Submit (sample shown above).
6. **Waiver Request:** If you would like to request a waiver for this Assessment: click "Waiver Request", complete the pop-up and click Submit (sample shown above).

**Waived/Suspended**

The Waived/Suspended queue includes all Assessments that have been waived or suspended by Freddie Mac.

**Grid Menu Items (these apply to items selected on the Grid):**

1. **Download Selected Templates:** To download multiple pre-populated templates, Select the Assessments using the checkbox, click the Download Assessment Templates and PRS will place a
pre-populated version of the selected templates in a Document Interface popup window. To download these files as a zip, selected all files, right-click and select "Download as Zip".

2. Output To Excel: Click this button to output the Grid to Excel

**Context Menu Items (these apply only to a single selected Assessment):**

1. View Loan Details: Opens a popup with details about the Loan with which this Assessment is associated, including previous Assessments.
2. Download Template: To retrieve a pre-populated template for this Assessment, click this button and PRS will place the pre-populated version of the selected templates in a Document Interface popup window. To download this file, right-click on it and select "Download".
3. View Documents: Provides a popup with a Document Interface window to the documents (Assessments and Attachments) for the Assessment. You cannot upload documents directly to this page, all uploads should be done through the Upload: Upload Individual Files item on the Main Menu.

**Completed**

The Completed queue includes assessments that have met all submission requirements and are waiting to be processed. At this point, PRS holds the Assessment files for 5 business days before moving the files to Accepted status in order to allow Seller/Servicers the opportunity to provide any updates or make any corrections. Note that the annual and quarterly assessments for CREFC Forms of warehouse and securitized loans are only held at complete status for 1 day.

**Grid Menu Items (these apply to items selected on the Grid):**

1. Download Selected Templates: To download multiple pre-populated templates, Select the Assessments using the checkbox, click the Download Assessment Templates and PRS will place a pre-populated version of the selected templates in a Document Interface popup window. To download these files as a zip, selected all files, right-click and select "Download as Zip".
2. Output To Excel: Click this button to output the Grid to Excel

**Context Menu Items (these apply only to a single selected Assessment):**

1. View Loan Details: Opens a popup with details about the Loan with which this Assessment is associated, including previous Assessments.
2. Download Template: To retrieve a pre-populated template for this Assessment, click this button and PRS will place the pre-populated version of the selected templates in a Document Interface popup window. To download this file, right-click on it and select "Download".
3. View Form: To view the form on-screen, click View Form. This will open a popup window with the associates Assessment.
4. View Documents: Provides a popup with a Document Interface window to the documents (Assessments and Attachments) for the Assessment. You cannot upload documents directly to this page, all uploads should be done through the Upload: Upload Individual Files item on the Main Menu.

**Accepted**

The Accepted queue includes Assessments that are being reviewed by Freddie Mac. Document uploaded to these assessments is not available and will fail. If you need to re-upload a file to any Assessment in the Accepted queue, please contact your Freddie Mac representative.
Context Menu Items (these apply only to a single selected Assessment):

1. View Form. To view the form on-screen, click View Form. This will open a pop-up window with the associated Assessment.
2. View Loan Details: Opens a popup with details about the Loan with which this Assessment is associated, including previous Assessments.
3. View Documents: Provides a popup with a Document Interface window to the documents (Assessments and Attachments) for the Assessment. You cannot upload documents directly to this page, all uploads should be done through the Upload: Upload Individual Files item on the Main Menu.
Loan Management, Quarterly Financial, Annual Financial, Inspection, Fin Stmt/Rent Roll Queues

As with all other queues in the system, the Loan Management Assessment Queues use the Grid control. Basic functionality of the Grids is described in the Common Controls section of this User Manual. Functionality specific to each page is described below.

For your convenience, the Loan Management Assessment Queues are grouped by status of Due, Waived/ Suspended, Completed, and Accepted, and are described below:

1. **Due**: The Due queue includes all Loan Management Assessments that are in Due status. This includes assessments that are due, late, don't have the necessary documentation, have been returned by Freddie Mac and have a Waiver or Extension request pending with Freddie Mac. The sub-statuses are indicated in the grid.

2. **Waived / Suspended**: The Waived / Suspended queue includes all Loan Management Assessments that have been waived by Freddie Mac.

3. **Complete**: The Complete queue includes all Loan Management Assessments that have met all submission requirements and are waiting to be finalized.

4. **Accepted**: The Accepted queue includes Assessments that are being reviewed by Freddie Mac. These assessments are no longer available for upload.

**Due**

The Loan Management, Quarterly Financial, Annual Financial, and Inspection Due queue includes all Assessments that are in Due statuses of the selected assessment type. This includes assessments that are due, late, don't have the necessary documentation, have been returned by Freddie Mac and have a Waiver or Extension request pending with Freddie Mac. The sub-statuses are indicated in the grid.

**Grid Menu Items (these apply to items selected on the Grid):**

1. **Download Selected Templates**: To download multiple pre-populated templates, select the Assessments using the check box, click the Download Assessment Templates and PRS will place a pre-populated version of the selected templates in a Document Interface pop-up window. To download these files as a zip, select all files, right-click and select "Download as Zip".

2. **Due Date Change Request**: Allows users to request a Due Date change for the selected assessments.
3. **Waiver Request**: Allows users to submit a bulk Waiver request for the selected assessments

4. **Output To Excel**: Click this button to output the Grid to Excel
Context Menu Items (these apply only to a single selected Assessment):

1. View Loan Details: Opens a popup with details about the Loan with which this Assessment is associated, including previous Assessments.

2. Download Template: To retrieve a pre-populated template for this Assessment, click this button and PRS will place the pre-populated version of the selected templates in a Document Interface popup window. To download this file, right click on it and select "Download".

3. View Form. To view the form on-screen, click View Form. This will open a popup window with the associates Assessment.

4. View Documents: Provides a popup with a Document Interface window to the documents (Assessments and Attachments) for the Assessment. You cannot upload documents directly to this page, all uploads should be done through the Upload: Upload Individual Files item on the Main Menu.

5. Due Date Change Request: If you would like to request an extension for this Assessment: click
6. Waiver Request: If you would like to request an extension for this Assessment, click "Request Extension", complete the popup and click Submit (sample shown above).
Waived / Suspended

The Loan Management, Quarterly Financial, Annual Financial, and Inspection Waived / Suspended queue includes all Assessments that have been waived or suspended by Freddie Mac for the selected assessment type.

Grid Menu Items (these apply to items selected on the Grid):

1. Download Selected Templates: To download multiple pre-populated templates, Select the Assessments using the checkbox, click the Download Assessment Templates and PRS will place a pre-populated version of the selected templates in a Document Interface popup window. To download these files as a zip, selected all files, right-click and select "Download as Zip".
2. Output To Excel: Click this button to output the Grid to Excel

Context Menu Items (these apply only to a single selected Assessment):

1. View Loan Details: Opens a popup with details about the Loan with which this Assessment is associated, including previous Assessments
2. Download Template: To retrieve a pre-populated template for this Assessment, click this button and
PRS will place the pre-populated version of the selected templates in a Document Interface popup window. To download this file, right click on it and select "Download".

3. View Documents: Provides a popup with a Document Interface window to the documents (Assessments and Attachments) for the Assessment. You cannot upload documents directly to this page, all uploads should be done through the Upload: Upload Individual Files item on the Main Menu.

**Complete**

The Loan Management, Quarterly Financial, Annual Financial, and Inspection Complete queue includes assessments that have met all submission requirements and are waiting to be processed. At this point, PRS holds the Assessment files for 5 business days before moving them to Accepted status in order to allow Seller/Servicers the opportunity to provide any updates or make any corrections.

**Grid Menu Items (these apply to items selected on the Grid):**

1. Download Selected Templates: To download multiple pre-populated templates, Select the Assessments using the checkbox, click the Download Assessment Templates and PRS will place a pre-populated version of the selected templates in a Document Interface popup window. To download these files as a zip, selected all files, right-click and select "Download as Zip".

2. Output To Excel: Click this button to output the Grid to Excel

**Context Menu Items (these apply only to a single selected Assessment):**

1. View Loan Details: Opens a popup with details about the Loan with which this Assessment is associated, including previous Assessments

2. Download Template: To retrieve a pre-populated template for this Assessment, click this button and PRS will place the pre-populated version of the selected templates in a Document Interface popup window. To download this file, right click on it and select "Download".

3. View LMF (Loan Management) Form: Provides a popup with a Document Interface window to the documents (Assessments and Attachments) for the Assessment. You cannot upload documents directly to this page, all uploads should be done through the Upload: Upload Individual Files item on the Main Menu.

4. View Documents: Provides a popup with a Document Interface window to the documents (Assessments and Attachments) for the Assessment. You cannot upload documents directly to this page, all uploads should be done through the Upload: Upload Individual Files item on the Main Menu.

**Accepted**

The Loan Management, Quarterly Financial, Annual Financial, and Inspection Accepted queue includes Assessments that are being reviewed by Freddie Mac. Document uploads of assessments in Accepted status is not available and will fail. If you need to re-upload a file to any Assessment in the Accepted queue, please contact your Freddie Mac representative.

**Grid Menu Items (these apply to items selected on the Grid):**

1. Output To Excel: Click this button to output the Grid to Excel
Context Menu Items (these apply only to a single selected Assessment):

1. View LMF (Loan Management) Form. To view the form on-screen, click View Form. This will open a popup window with the associates Assessment.
2. View Loan Details: Opens a popup with details about the Loan with which this Assessment is associated, including previous Assessments.
3. View Documents: Provides a popup with a Document Interface window to the documents (Assessments and Attachments) for the Assessment. You cannot upload documents directly to this page, all uploads should be done through the Upload: Upload Individual Files item on the Main Menu.
Loan Details

Loan Details provides information regarding the loan. Data on this page is being populated from the Population File.

Upon opening the Loan Details screen, users can view details for individual Loan Management, Annual Financial, Quarterly Financial, and Inspection records. In addition, users can view the activity (i.e., Due Date changes, Waiver requests, suspensions, and assessment returns) that’s occurred on the selected loan.

Assessment Details

Loan Management Details, Annual Financial Details, Quarterly Financial Details and Inspection Details pages include the following sections:

- Overview section: Data from the Population upload
- Forms: List of forms for this Assessment

Example:
Activity

Summary of Waiver and Due Date Change Requests for this particular assessment are listed on this page.
Common Controls

Grids

Many screens in PRS are grid based that include similar functionality. This functionality is enabled as needed on each grid and is not be available on all pages depending on required functionality. This section reviews the basic functionality of the grids that applies across the system.

Sorting

If sorting is enabled, users are able to sort the grid by any column by clicking on the column header.

The sorting function toggles between three modes:
- ascending
- descending
- no sort

Some grids have a default sort enabled and the user is able to override this default by clicking the header to sort by a different column. If the user leaves the page and returns, the grid will return to the default sort.

Filtering

When filtering is enabled, a filtering item appears below the column header. The user can enter a filter criterion in the filter box. A drop-down list allows the user to select a filter expression that is applied to the criterion for the column. When the user presses the filter button (next to the filter box), the grid displays only the records matching the filter criteria specified using the filter boxes:

All filters in a single table are applied using AND operator. That is, only items (grid rows) that comply with all filters are displayed.
Note: When you have more than one value to filter on, values should be entered separated by a space.

Row Selection

Selecting a Row with a Click

Users can select a single data row in the grid by left clicking anywhere within the row:

<table>
<thead>
<tr>
<th>Customer</th>
<th>Company</th>
<th>Contact</th>
<th>Country</th>
</tr>
</thead>
<tbody>
<tr>
<td>ALFKI</td>
<td>Alfreds Futterkiste</td>
<td>Maria Anders</td>
<td>Germany</td>
</tr>
<tr>
<td>ANATR</td>
<td>Ana Trujillo Emparedados y helados</td>
<td>Ana Trujillo</td>
<td>Mexico</td>
</tr>
<tr>
<td>ANTON</td>
<td>Antonio Moreno Taqueria</td>
<td>Antonio Moreno</td>
<td>Mexico</td>
</tr>
<tr>
<td>AROUT</td>
<td>Around the Horn</td>
<td>Thomas Hardy</td>
<td>UK</td>
</tr>
<tr>
<td>BERGS</td>
<td>Berglunds snabbköp</td>
<td>Christina Berglund</td>
<td>Sweden</td>
</tr>
</tbody>
</table>

Selecting a Row with a Checkbox

If available, users can select one or more data rows in the grid by clicking the checkbox within the row:

<table>
<thead>
<tr>
<th>CustomerID</th>
<th>CompanyName</th>
<th>ContactName</th>
<th>Country</th>
</tr>
</thead>
<tbody>
<tr>
<td>ALFKI</td>
<td>Alfreds Futterkiste</td>
<td>Maria Anders</td>
<td>Germany</td>
</tr>
<tr>
<td>ANATR</td>
<td>Ana Trujillo</td>
<td>Ana Trujillo</td>
<td>Mexico</td>
</tr>
<tr>
<td>ANTON</td>
<td>Antonio Moreno Taqueria</td>
<td>Antonio Moreno</td>
<td>Mexico</td>
</tr>
<tr>
<td>AROUT</td>
<td>Around the Horn</td>
<td>Thomas Hardy</td>
<td>UK</td>
</tr>
<tr>
<td>BERGS</td>
<td>Berglunds snabbköp</td>
<td>Christina Berglund</td>
<td>Sweden</td>
</tr>
</tbody>
</table>

Context Menu

The Context Menu or Right-click Menu is used to perform an action on a single record. While hovering over a row on a grid, click the right button on the mouse to bring up the Context menu. The Context Menu offers a limited set of choices that are available in the current state, or context, of the items on the grid.
Grid Menu

The Grid Menu is used to perform an action on multiple records. To select multiple rows, check the box on the left side of each row. To perform an action on these rows, click the appropriate button on the Grid Menu.

Document Interface

PRS utilized a standard document interface to manage all document repositories within the system. The basic functionality includes the following:

- **Menu Items:** Up One Level, Create New Folder, Download and Upload
- **Left Panel:** Tree view showing the folder structure
- **Main Window:** Listing of documents in the repository

Upload Files

1. On the menu, click on the blue UP arrow (Upload Files).
2. The Upload Files window will pop-up.

3. Click "Add..."

4. The Select Files window will popup.
5. Navigate to the appropriate folder and select the files you wish to upload and click Open.

6. The file(s) you selected will appear in the Upload Files window. If you would like to add more files, repeat steps 3 through 5. If you would like to clear a file, right-click on that file and select "Clear".

7. Once you are ready to complete the upload, click "Upload".

8. If successful, your document will appear in the Document Interface.
Excel Assessment Templates

The Assessment forms are in Microsoft Excel 2003 format and can be downloaded via the Download menu from within PRS (http://multifamily-prs.rrd.com/). Once downloaded, users must enable Macros in Excel for all validations and conditional formatting to work properly (see instructions for Excel 2007 here: http://office.microsoft.com/en-us/help/enable-or-disable-macros-in-office-documents-HA010031071.aspx). Assessments are to be completed and stored on your local machine, file server, or document management system (depending upon local IT policies and procedures). For LMF assessments upon successful completion and validation that all fields have been correctly entered by the user, the Excel Assessment file will indicate a status of Complete on the Progress Bar (as shown below).

Once the status of the Assessment form indicates Complete the completed form can be uploaded into the PRS system, where any Assessment(s) with a status of Incomplete will be automatically Rejected by the system, for the user to correct any critical issues.

Additional Excel Functionality

The following validation functionality is included in each Excel version of the Bulk Template Assessment file (except for CREFC and Inspection forms):

<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Progress Bar</td>
<td>Indicates % of required fields that are complete. PRS will not accept incomplete assessments.</td>
<td></td>
</tr>
<tr>
<td>Required Field</td>
<td>Red outline on field indicates a response is required. Once data is entered into the field, the red outline is removed. Please note that the requirement criteria for certain fields is dependent on the response to other questions and will automatically change based on those responses.</td>
<td></td>
</tr>
<tr>
<td>Validate</td>
<td>Runs the field formatting validation</td>
<td>Validate</td>
</tr>
<tr>
<td>Clear Answers</td>
<td>Delete all data on the worksheet</td>
<td>Clear Answers</td>
</tr>
<tr>
<td>Show Errors</td>
<td>Shows all Errors on a worksheet. This is helpful if there are incomplete fields or other errors that are hard to find with the red outline indicator.</td>
<td>Show Errors</td>
</tr>
<tr>
<td>Hide Error</td>
<td>Hides all Error comment boxes on a worksheet.</td>
<td>Hide Errors</td>
</tr>
</tbody>
</table>

Upload Criteria

Checklist for successful upload of an Assessment form to PRS:

1. File Name per file naming convention
2. All Required Fields are complete
3. Version is active in PRS
4. Freddie Mac Loan number is available in PRS
5. Effective Period is available in PRS