PRS LMF Bulk Template Desk Reference
Bulk LMF Template
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Freddie Mac
Multifamily™
The concept of the Bulk Loan Management Form (LMF) template is to provide Servicers the capacity to submit LMF on multiple loans at one time. The Bulk template contains all data fields contained in the LMF Form. This allows Servicers the ability to extract the required data fields from their Asset Management system and copy and paste the data into the Bulk LMF template for multiple loans for upload to PRS.

**Form—General Guidance**

- Always enable the macro and Active X controls before using the template.
- Bulk Template: Bulk LMF template may be downloaded from the Blank Assessment Templates page of PRS under the Downloads on the main menu. Uploads will only be accepted in this format.
- Complete Template: Populate the required data fields in columns “A” to “U”.
- Validation Process: Perform completeness checks and validations in the template by clicking the “Validate” button.
- Loan Status: Provides a status of “Complete” or “Incomplete”. In Bulk LMF submission each loan record will have “complete” or “incomplete” status. At the time of submission only those loan records that have “complete” status will be accepted by PRS. Assessment completeness feedback is provided in column “W” of the Bulk LMF Template.
- Required Fields: By running field formatting validation within the template, fields requiring user input will show a red border around them. All red borders within the form need to be cleared before a loan record can have a “Complete” status.
- Valid Data Format: Certain fields contain validation rules that check whether or not the value entered into the field is correctly formatted. Such fields contain comments regarding the format rule. You will have to meet all format rules for each loan record to have “Complete” status.

**Bulk LMF template**

![Bulk LMF template diagram](image)
The following validation functionality is included in the Bulk Template:

<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Loan Status</td>
<td>Each loan record will have a “Complete” or “Incomplete” status. PRS will skip loans that have “Incomplete” status and will only accept loans that have “complete” status</td>
<td><img src="image" alt="Loan Status" /></td>
</tr>
<tr>
<td>Validate</td>
<td>Runs the field formatting validation</td>
<td><img src="image" alt="Validate" /></td>
</tr>
<tr>
<td>Required Field</td>
<td>When validation is run in the template, a red outline on a data field indicates an input is required. Once data is entered into the field and the validation is run again, the red outline gets removed. Please note that the requirement criteria for certain fields is dependent on the response to other questions.</td>
<td><img src="image" alt="Required Field" /></td>
</tr>
<tr>
<td>Clear Validations</td>
<td>Clears all errors identified during validation</td>
<td><img src="image" alt="Clear Validations" /></td>
</tr>
<tr>
<td>Find Errors</td>
<td>Finds 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><img src="image" alt="Find Errors" /></td>
</tr>
<tr>
<td>Reset Find Format</td>
<td>Resets the Find Format by clearing prior find errors execution</td>
<td><img src="image" alt="Reset Find Format" /></td>
</tr>
<tr>
<td>Goto Status</td>
<td>Directs users to the column in the spreadsheet where loan statuses are displayed</td>
<td><img src="image" alt="Goto Status" /></td>
</tr>
</tbody>
</table>
Examples and Tips

You can determine the status of a loan by going to the loan status column. Please note that at the time of upload, loans that have “Complete” status will be accepted by PRS, while loans that have “Incomplete” status will be rejected.

Finding errors in Bulk LMF template is easier with Find Errors functionality. This functionality allows you to skip to the errors for easier resolution.
The Freddie Mac loan number is a unique identifier and is required to be provided in every row in which data is provided. If you fail to provide the loan number the Loan Status will indicate “Empty Row” and the information will not be captured.
Bulk Upload Process

To upload a bulk LMF file, perform the following functions:

1. Click “Upload Bulk Data File” from the “Upload” menu.

   ![Upload Bulk File](image)

   This will take you to the Upload Bulk File page.

2. Enter the file path or click **Select** and locate your Excel file that is ready for upload.

3. Once you have entered the path, click **Submit**.

   The bulk file will upload and the loan records that have failed to be uploaded will be listed on the “Upload Failures” screen.

**Note:** The file naming convention listed below needs to be followed strictly for the Bulk LMF template and be uploaded successfully into PRS.

<table>
<thead>
<tr>
<th>File Type</th>
<th>Document Naming Convention</th>
<th>File Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bulk Loan Management</td>
<td>Bulk_LMGT.xlsx</td>
<td>Excel File (.xls, .xlsx, or .xlsm)</td>
</tr>
</tbody>
</table>
**Viewing Uploaded Assessments in PRS**

Upon successful upload, PRS will process each row (Assessment) as if it were an individual file and will append the row number and loan number to the file name. Failed Assessments can be corrected and uploaded again using the process described above.

Successful Assessments will be processed through PRS using the standard workflow queues. You can view the form for each assessment record by clicking “View LMF Form” from the Context menu in the assessment Queue Grid.