# PRS/Reserve Reporting
## System Administrator Quick Start Manual

Freddie Mac Multifamily

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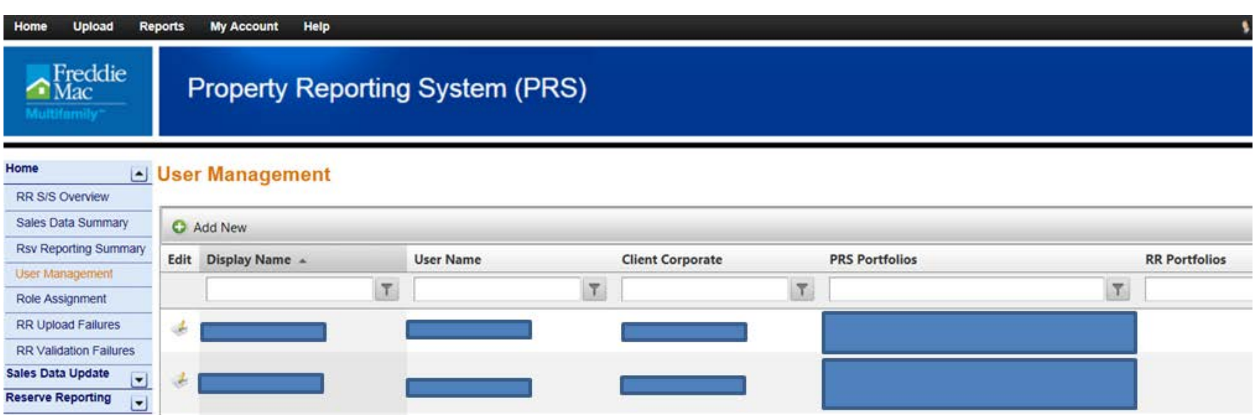
System administrators have the ability to add, edit, manage and inactivate users using the User Management and Role Assignment functions for Property Reporting and Reserve Reporting purposes.

## Definitions

- Users: Property Reporting System (PRS) and/or Reserve Reporting (RR) users
- Client Corporate: The parent company to which Freddie Mac has given the Seller/Servicer (S/S) Administrative access to
- Sub Companies: The portfolios associated with the Parent Company
- Role Assignments: See the Appendix

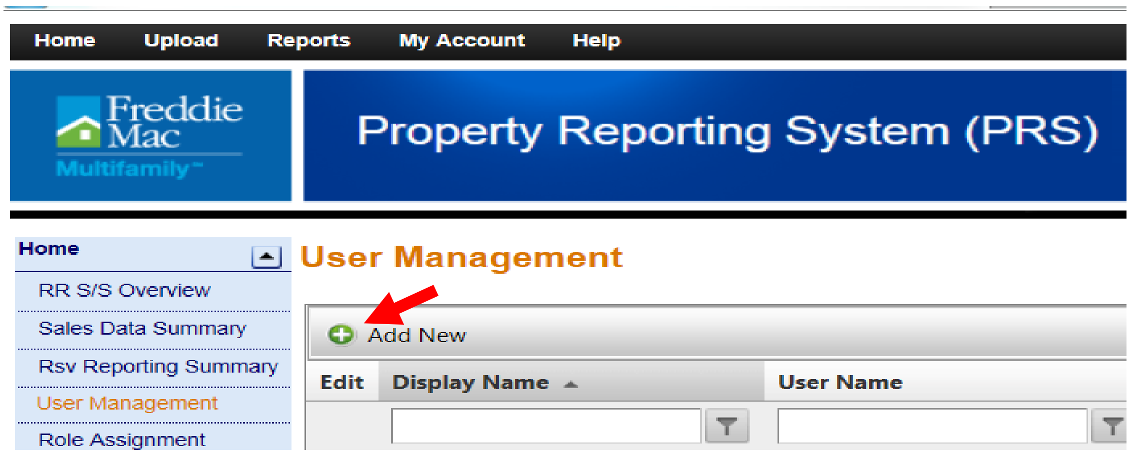
## User Management

The User Management screen allows system administrators to add, edit and inactivate users, and manage their relationship to their Client Corporate or parent company.



## Adding New Users

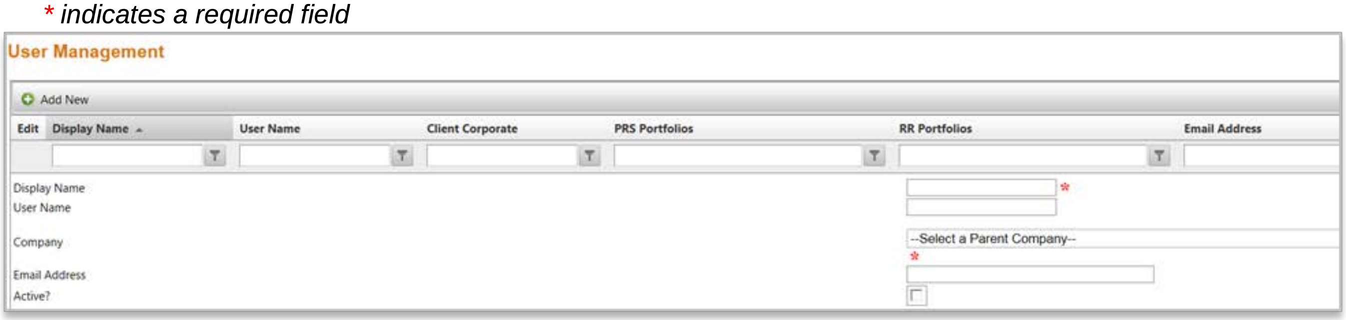
To **add** a new User to PRS, on the User Management page, click **Add New.**



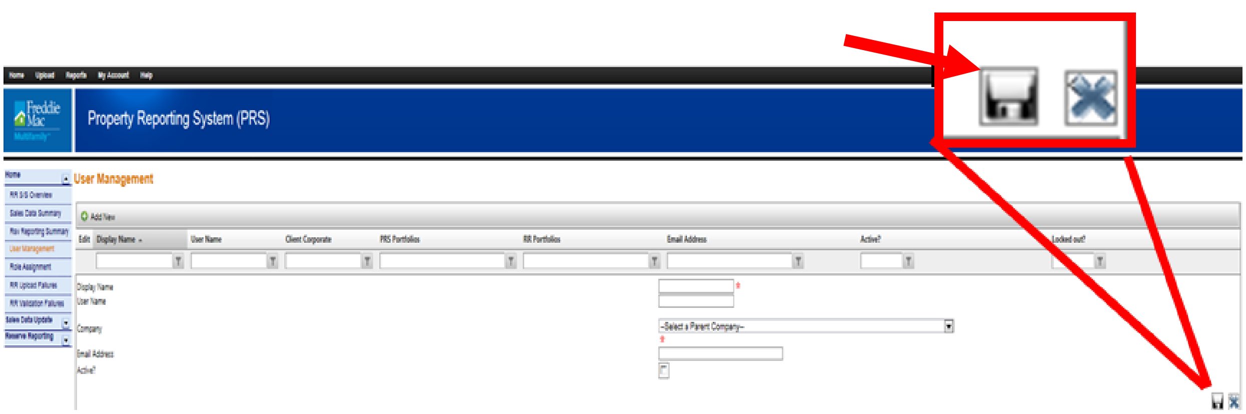

The grid expands and allows you to enter:

- Display Name
- User Name
- Client Corporate
- Email Address
- Active? (Check the checkbox)

* *indicates a required field*



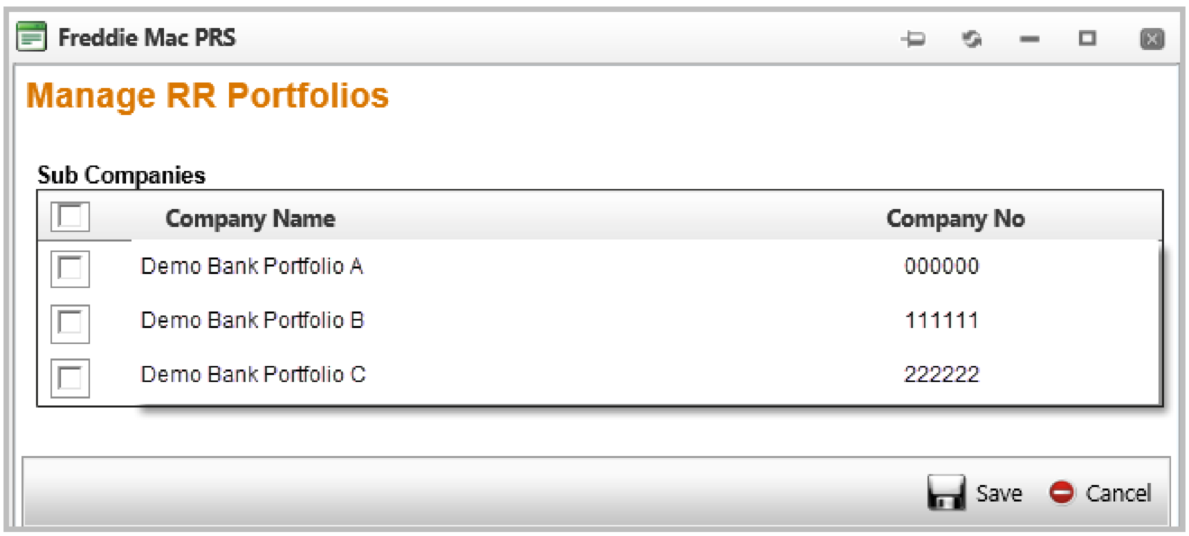

Once completed, click the disk icon to save.



## Assigning Servicer Portfolio(s)

1. To assign servicer portfolio(s), right click on user's name and select **Manage PRS Portfolios** or **Manage RR Portfolios**.

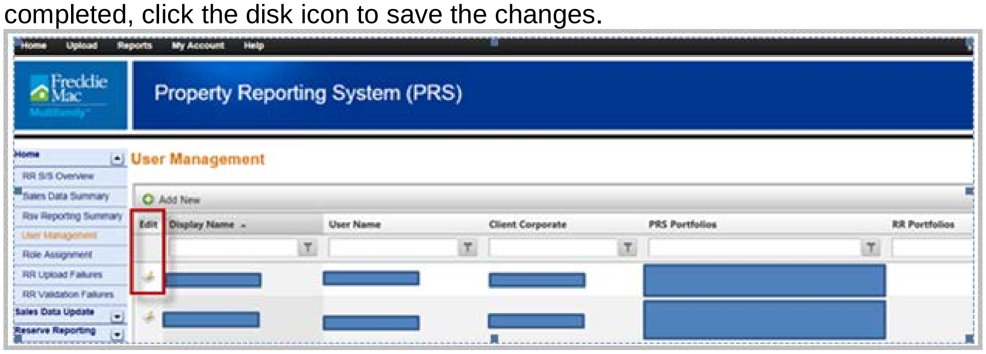

2. To assign a PRS or RR portfolio to a user, check the appropriate box that corresponds to Company Name and Company No.




**Note:** Existing (or new users) will have to have their PRS or RR specific portfolios assigned to their accounts independently (even if the portfolios are the same).

## Editing Users

To edit a user, perform a search of the user and click the Edit icon to edit the user's profile accordingly. Once completed, click the disk icon to save the changes.



### Making Users Inactive

To **inactivate** a user, perform a search of the user and click the Edit icon.  Uncheck the Active checkbox.  Once completed, click the disk icon to save the changes.

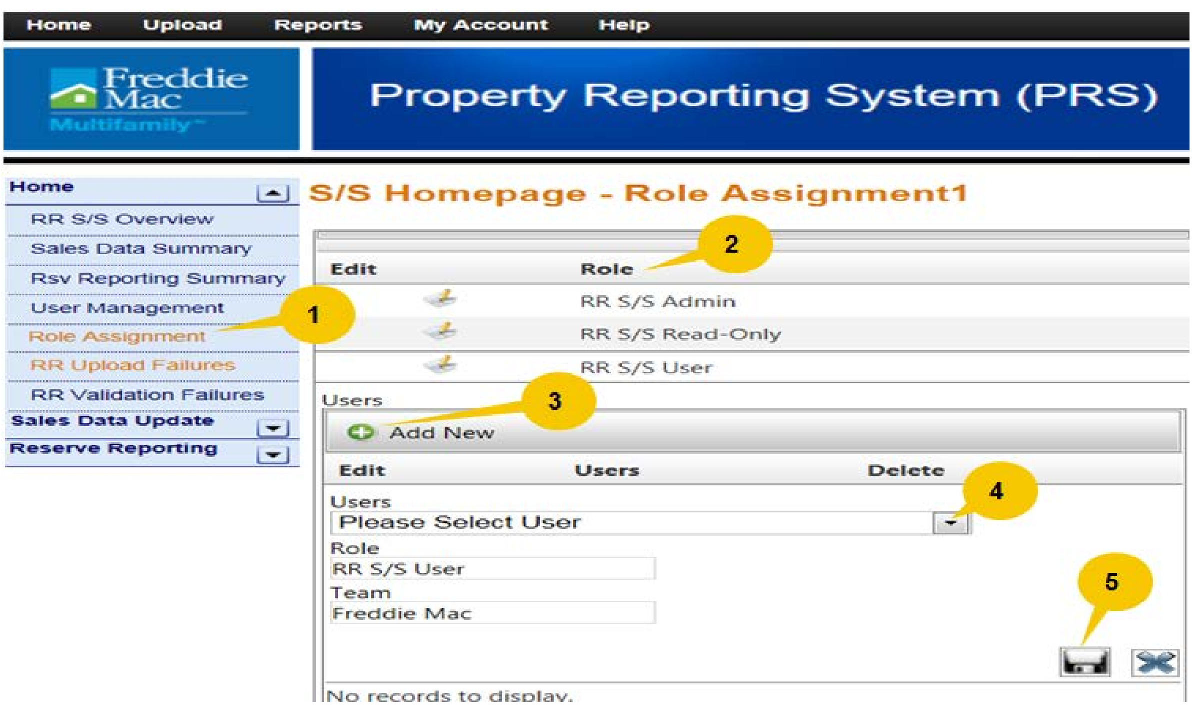

**Note:** Users cannot be permanently deleted, but can have their account status inactivated by unchecking the "Active?" box accordingly.

## Role Assignment

The Role Assignment screen allows the system administrator assign a role to the user.  To assign a role to a user:

1. Go to the Role Assignment page.
2. Select the appropriate role (Refer to the Appendix for Role Descriptions and Functions) and click "Edit" to expand

   Note:  Seller/Servicer Admin has access to the User Management and Role Assignment pages, whereas the Seller/Servicer User role does not
3. Click on **"Add New"**
4. Select the appropriate user from the drop-down list
5. Click on the disk icon to save the changes




**Note:** "Team" is not utilized and will always be Freddie Mac

### Note about User Role

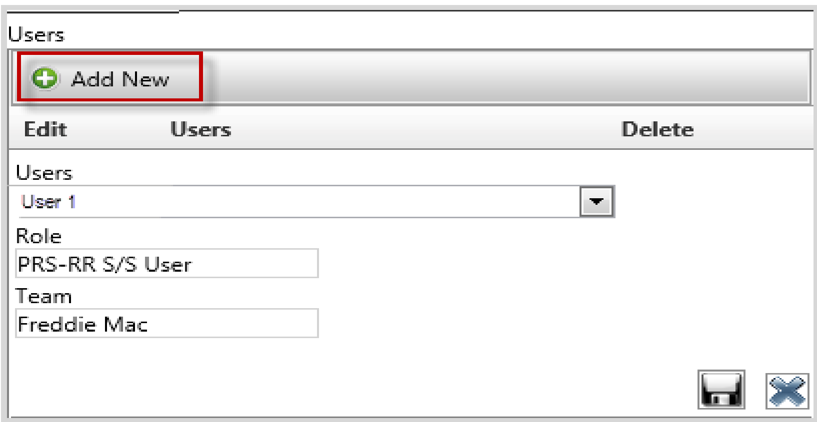
A user can only have **one role** assigned to them at any time. For an existing user who needs to be moved to another role, delete them from the existing role and add them to the new role.

**Example:**

For an existing PRS user:

a) Delete the "PRS Servicer Role" from existing user


b) Add the "PRS-RR S/S User" role to that user

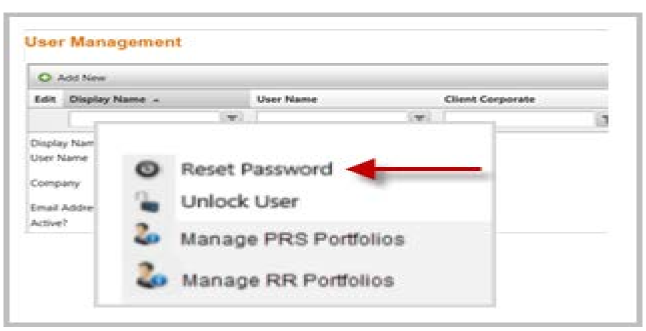



## Reset User Password

To send the user a temporary password by email:

Go to the User Management page, right-click on the username and click Reset Password

The PRS system will automatically send a temporary password to the email address associated with the user



## Appendix – Role Descriptions and Functions

| Seller/Servicer Roles | Description | Functions |
|---|---|---|
| PRS-RR S/S Admin | • PRS-RR S/S Admin manages user access and role assignments for PRS and RR. This role provides access to PRS and RR functions. | **User Access**<br>• Set up Seller/Servicer employee and contractor access rights.<br>• Maintain User Rights (passwords and deactivate users)<br>• Assign portfolios<br>• Assign roles<br><br>**PRS Functions:**<br>• Update Seller/Servicer Contact Information<br>• View/Query Rights for Seller/Servicer Portfolio based on secure ID rights to legal entity portfolio<br>• View the following Queues – Due, Waived/Suspended, Complete, Accepted for LMF/QIE/AIE/AIF Assessments<br>• View Loan Details<br>• View PRS Pipeline Summary<br>• View PRS Upload Failures<br>• View PRS Validation Failures<br>• View and Update PRS Data Warnings<br>• View and Run all Servicer PRS Reports<br>• Upload Individual / Bulk Assessment Files<br><br>**RR Functions:**<br>• Update Seller/Servicer Contact Information<br>• View/Query Rights for Seller/Servicer Portfolio based on secure ID rights to legal entity portfolio<br>• View the following Queues – Due, S/S Under Review, FM Under Review, All, Accepted , FM Final Approval<br>• Change Warning to FM Under Review or Accepted in S/S Under Review Warning Queue<br>• View Loan Details and Warning Details from Accepted – Loan Queue<br>• View Sales Data and Reserve Reporting Summary and Detail Pipelines<br>• View RR Upload Failures<br>• View RR Validation Failures<br>• View and Run all Servicer RR Reports<br>• Upload Individual RR File |
| Servicer | • Servicer – PRS user that has read and file upload access to PRS functions. | **PRS Functions**<br><br>• Update Seller/Servicer Contact Information<br>• View/Query Rights for Seller/Servicer |

| Seller/Servicer Roles | Description | Functions |
|---|---|---|
| RR S/S User<br><br>PRS-RR S/S User | • RR S/S User – RR user has read and file upload access to RR functions.<br><br>• PRS-RR S/S User – User who has read and file upload access to both PRS and RR functions.<br><br>Note: A user may only have **one role** assigned to them at any time. For an existing user who needs to be moved to another role, delete them from the existing role and add them to the new role. | Portfolio based on secure ID rights to legal entity portfolio<br>• View the following Queues – Due, Waived/Suspended, Complete, Accepted for LMF/QIE/AIE/AIF Assessments<br>• View Loan Details<br>• View PRS Pipeline Summary<br>• View PRS Upload Failures<br>• View PRS Validation Failures<br>• View and Update PRS Data Warnings<br>• Upload Individual / Bulk Assessment Files<br><br>**RR Functions**<br>• Upload Files<br>• Update Seller/Servicer Contact Information<br>• View/Query Rights for Seller/Servicer Portfolio based on secure ID rights to legal entity portfolio<br>• View the following Queues – Due, S/S Under Review, FM Under Review, All, Accepted , FM Final Approval<br>• Change Warning to FM Under Review or Accepted in S/S Under Review Warning Queue<br>• Add Individual and Bulk Comments in S/S Review Warning Queue<br>• View Loan Details and Warning Details from Accepted – Loan Queue<br>• View RR Upload Failures<br>• View RR Validation Failures<br>• View S/S Summary and Detail Pipelines |
| PRS S/S Read Only<br><br>RR S/S Read –Only | • PRS S/S Read Only – User has read only access to PRS functions.<br><br>• RR S/S Read-Only - User has ready only access to RR functions.<br><br>Note: A user may only have **one role** assigned to them at any time. For an existing user who needs to be moved to another role, delete them from the existing role and add them to the new role.<br>. | **PRS functions:**<br>• View-Only – View/Query Rights S/S Portfolio based on secure ID rights to legal entity portfolio<br>• View – Only the following Queues – Due, Waived/Suspended, Complete, Accepted for LMF/QIE/AIE/AIF Assessments<br>• View Loan Details and Warning Details from Accepted – Loan Queue<br>• View PRS Pipeline Summary<br>• View PRS Upload Failures<br><br>**RR Functions:**<br>• View-Only – View/Query Rights S/S Portfolio based on secure ID rights to legal entity portfolio<br>• View the following Queues – Due, S/S Under Review, FM Under Review, All, Accepted , FM Final Approval |

| Seller/Servicer Roles | Description | Functions |
|---|---|---|
| | | • View Loan Details and Warning Details from Accepted – Loan Queue<br>• View Sales Data and Reserve Reporting Summary and Detail Pipelines<br>• View RR Upload Failures<br>• View RR Validation Failures |