Seller/Servicer System Administrator Training

February 2016

Freddie Mac
MULTIFAMILY

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System Administrator’s Role

- The System Administrator (SA) manages Seller/Servicer (S/S) employees’ and vendors’ access to Freddie Mac Multifamily software applications as necessary to sell and/or service loans.
- Freddie Mac Multifamily software applications include:
  - » MultiSuite Online Registration System (MSOR)
    - – System administrators use this tool register users for the following applications, systems, and tools: FreddieMac.com/Multifamily Secure Content, General Loan Information (GLI), MultiSuite for Investor Reporting, Insurance Compliance Tool, and Origination, Underwriting, and Securitization.
  - » MultiSuite for Investor Reporting (MSIR)
    - – MSIR is an application that supports the monthly reporting and remittance processes for Multifamily loans and bonds.
  - » Origination Underwriting and Securitization (OUS)
    - – OUS helps automate the workflow for processing loan applications from submission of the Loan Submission Template (LST) through the underwriting process.

System Administrator's Role

- Property Reporting System/Reserve Reporting (PRS/RR)
  - PRS provides a pipeline of assessment requirements and enables Servicers to upload property assessments, rent rolls and operating statements. The Reserve Reporting functionality of PRS enables Servicers to view their active Freddie Mac loans and upload escrow data and portfolio and warehouse loan terms data in bulk using an Excel® template.
- Multifamily Consent Request Tracker (CRT)
  - CRT provides a shared platform for all Servicing parties to monitor and report on the status and completion of borrower consent requests.
- Multifamily Document Management System (DMS)
  - DMS facilitates the electronic upload and storage of loan-related documents used throughout the life of a loan.
- Multifamily Insurance Compliance Tool (ICT)
  - ICT is a tool for submission of insurance coverage data at origination and during the annual certification. It is also used to request coverage requirement waivers.

System Administrator's Role

» Small Balance Loans Production Pipeline Manager (SBL PPM)

– SBL PPM is a tool that enables sellers to monitor the pipeline of Small Balance Loans. The objective of this tool is to improve the efficiency of entering new small balance deals into the pipeline, updating information on these deals, and reporting on the pipeline.

» Multifamily Securities Investor Access (MSIA)

– The MSIA tool is a disclosure website that provides investors with information related to the Freddie Mac Multifamily mortgage-backed securities, with issuances beginning in 2009, and their underlying collateral.

System Administrator's Responsibilities

- Access provisioning
  - » Identify each Seller/Servicer (SS) employee or vendor needing access to a particular Freddie Mac Multifamily software application.
  - » Identify the appropriate authority level of the employee's or vendor's access based on the employee's or vendor's roles and responsibilities.
  - » Register the user's contact information using the processes established by Freddie Mac.
- Access de-provisioning
  - » Delete, or request to delete, a user's access when a user leaves the SS employment or transitions to a role that no longer requires access to a particular software application, **within 30 days of the departure or transition**, using the processes established by Freddie Mac.
- User Verification and Certification
  - » Semi-annually, Freddie Mac requires that SAs recertify system users. The SAs will verify that the access and authority level for each of its system users of Freddie Mac Multifamily software applications is current and up-to-date.

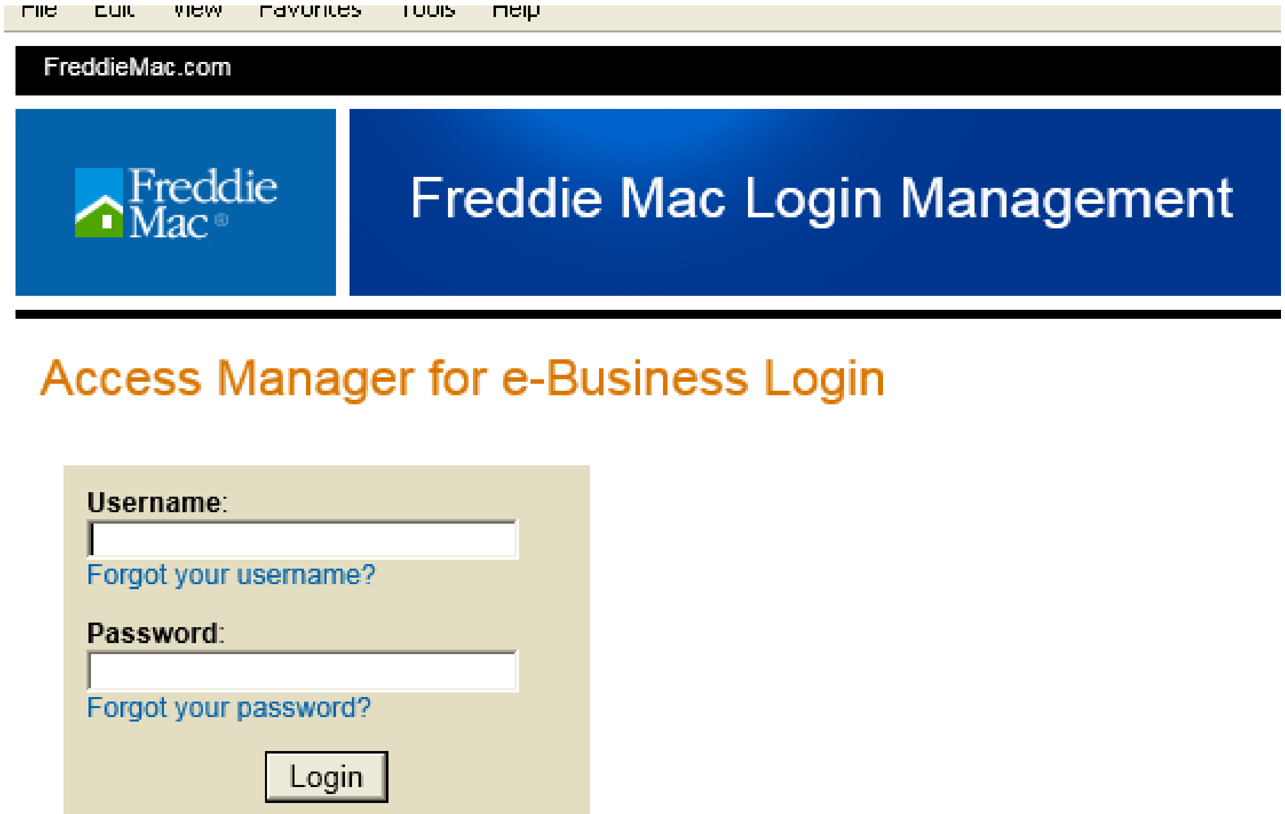
Applications/Systems/Tool

- MultiSuite Online Registration System (MSOR)
  - System administrators grant and assign the following access rights in MSOR as needed:
    - Basic (grants access to MultiSuite)
    - Data delivery (grants ability to access OUS)
    - Investor Reporting (grants access to MSIR)
    - Investor Reporting View Only (grants view-only access to MSIR)
    - ICT

- MultiSuite Online Registration System (MSOR) (cont'd)

User Setup

Login to MSOR:



- MultiSuite Online Registration System (MSOR) (cont'd)

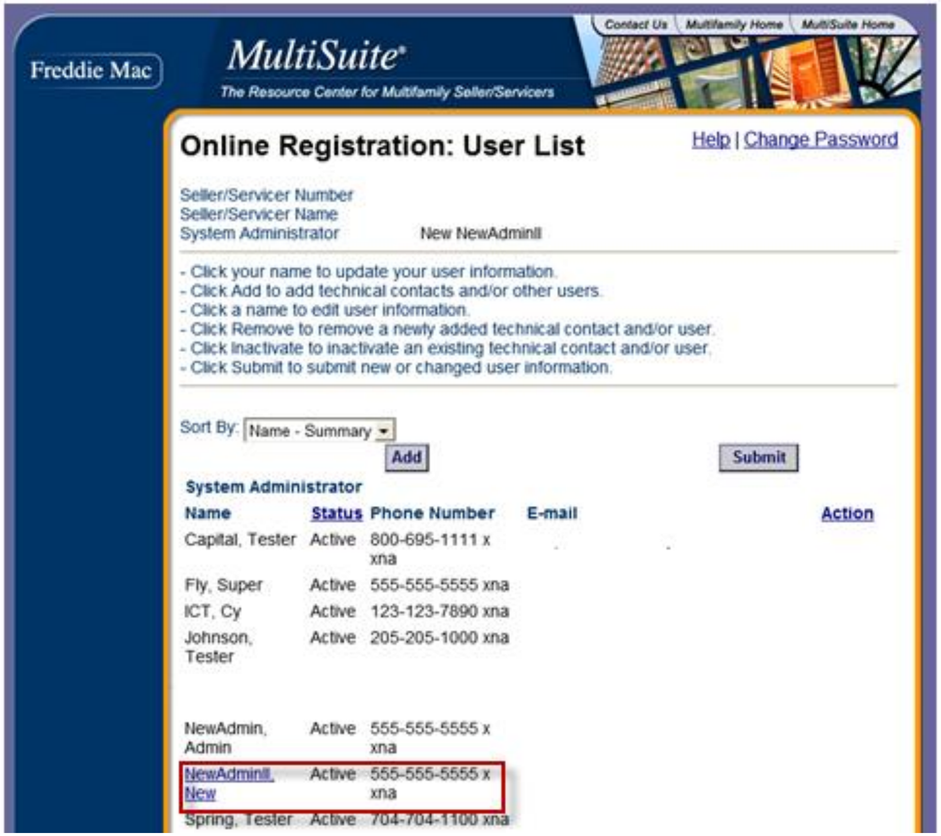
User Setup (cont'd)

Once the welcome screen appears, click "Maintain Users":

- MultiSuite Online Registration System (MSOR) (cont'd)

  User Setup (cont'd)

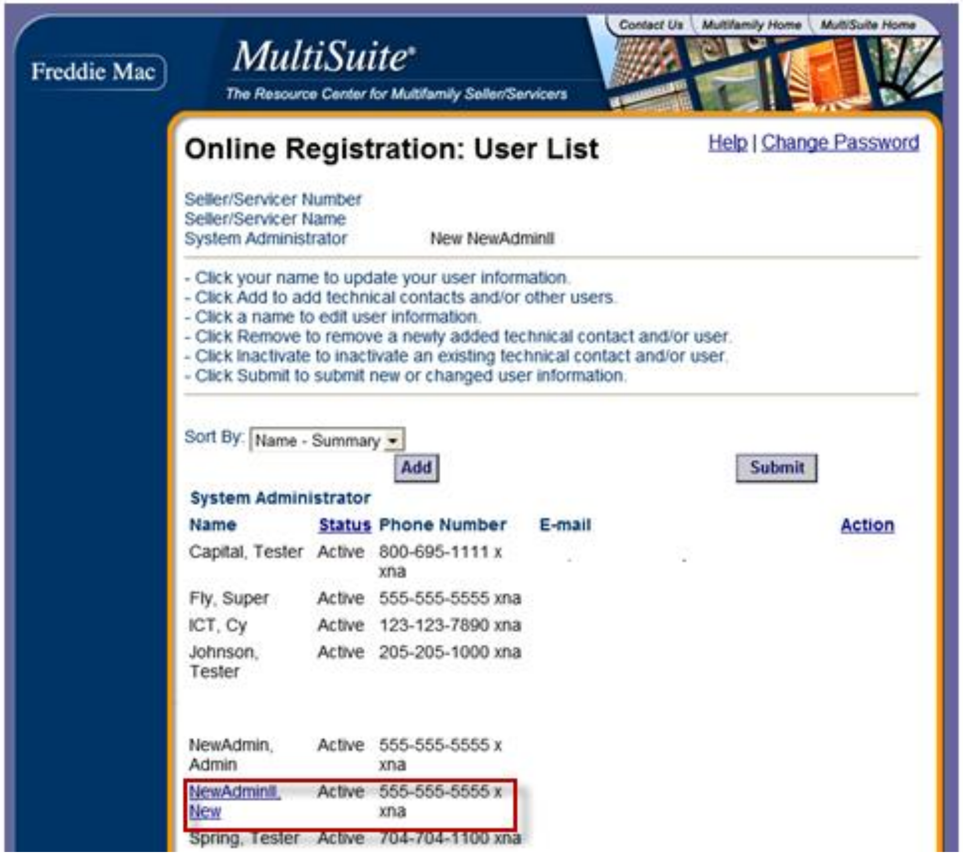
  The next screen shows the users currently registered in MSOR:



- MultiSuite Online Registration System (MSOR) (cont’d)

User Setup (cont’d)

Click “Add”:

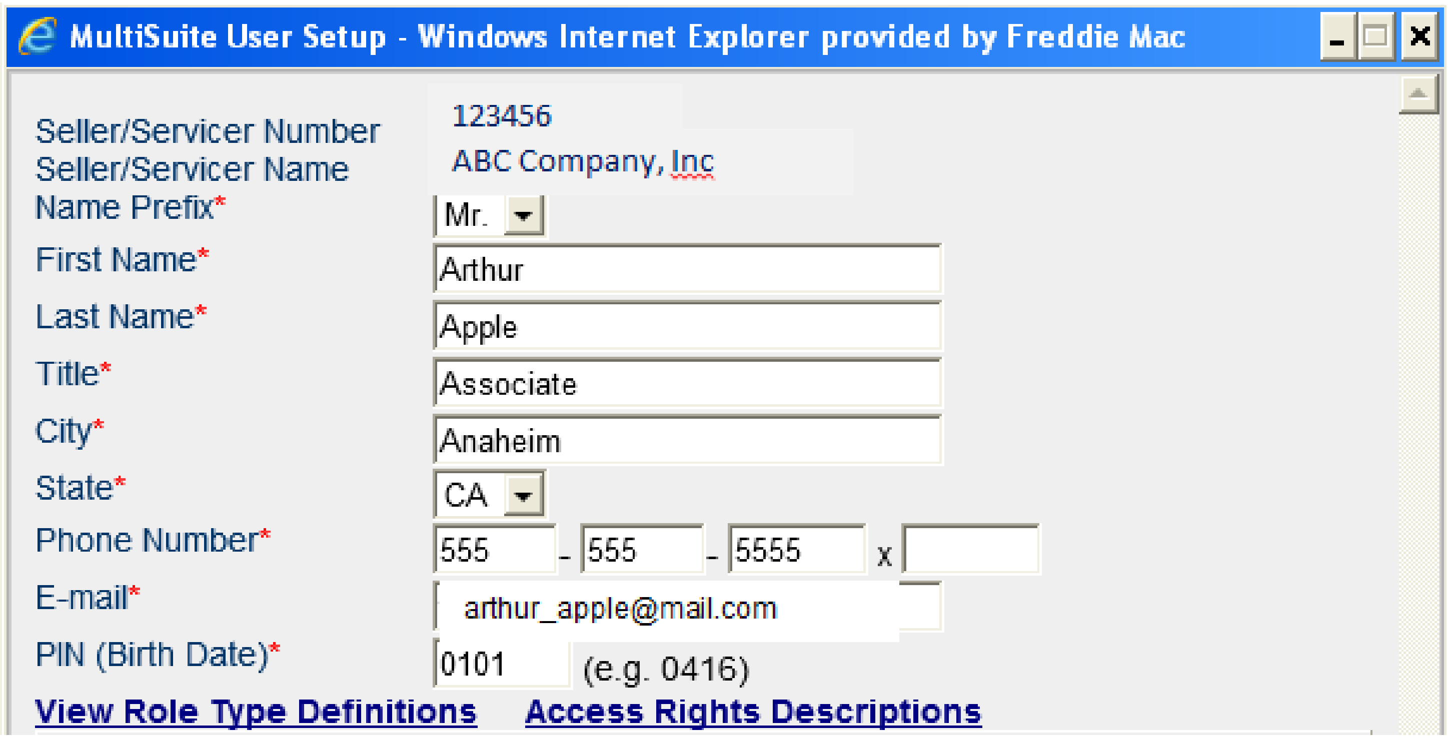


Applications/Systems/Tool (cont'd)

- MultiSuite Online Registration System (MSOR) (cont'd)

User Setup (cont'd)

The user setup screen appears; enter required information:


MultiSuite User Setup - Windows Internet Explorer provided by Freddie Mac

Seller/Servicer Number	123456
Seller/Servicer Name	ABC Company, Inc
Name Prefix*	Mr.
First Name*	Arthur
Last Name*	Apple
Title*	Associate
City*	Anaheim
State*	CA
Phone Number*	555 - 555 - 5555 x
E-mail*	arthur_apple@mail.com
PIN (Birth Date)*	0101 (e.g. 0416)

View Role Type Definitions   Access Rights Descriptions

Note: *Fields with the * require data input.*

Applications/Systems/Tool (cont'd)

- MultiSuite Online Registration System (MSOR) (cont'd)

  User Setup (cont'd)

  The current user has basic access rights; select the additional rights required and click "Add/Update":

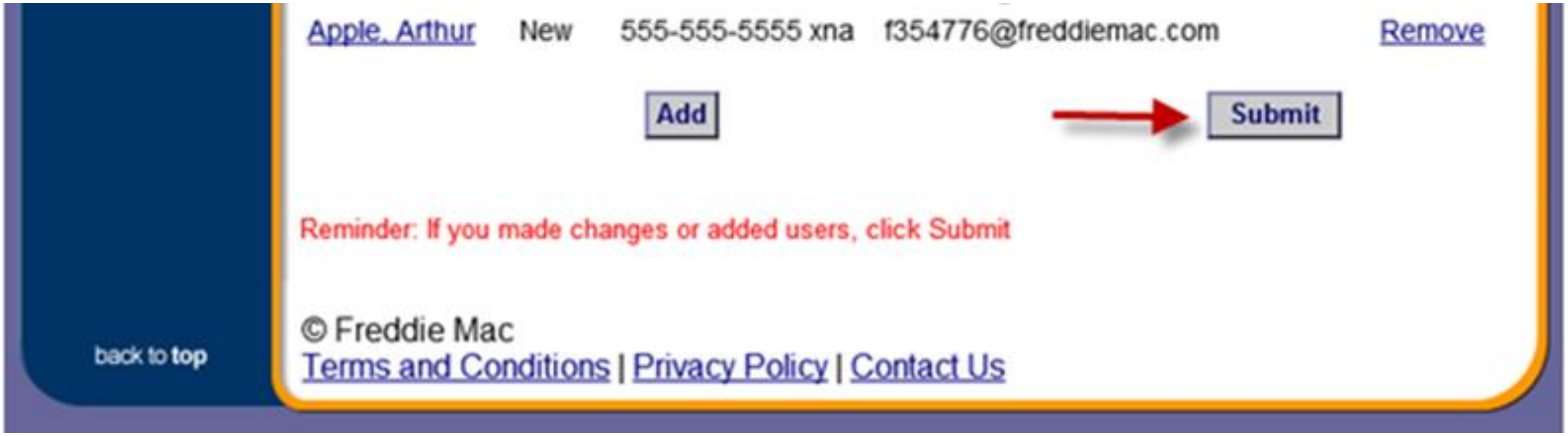
***Note:** If the user's access needs to be deactivated, simply uncheck the box for the access rights that are no longer required.*

Applications/Systems/Tool (cont'd)

- MultiSuite Online Registration System (MSOR) (cont'd)

  User Setup (cont'd)

  Returning to the "User List" screen, click "Submit" to finalize the request:



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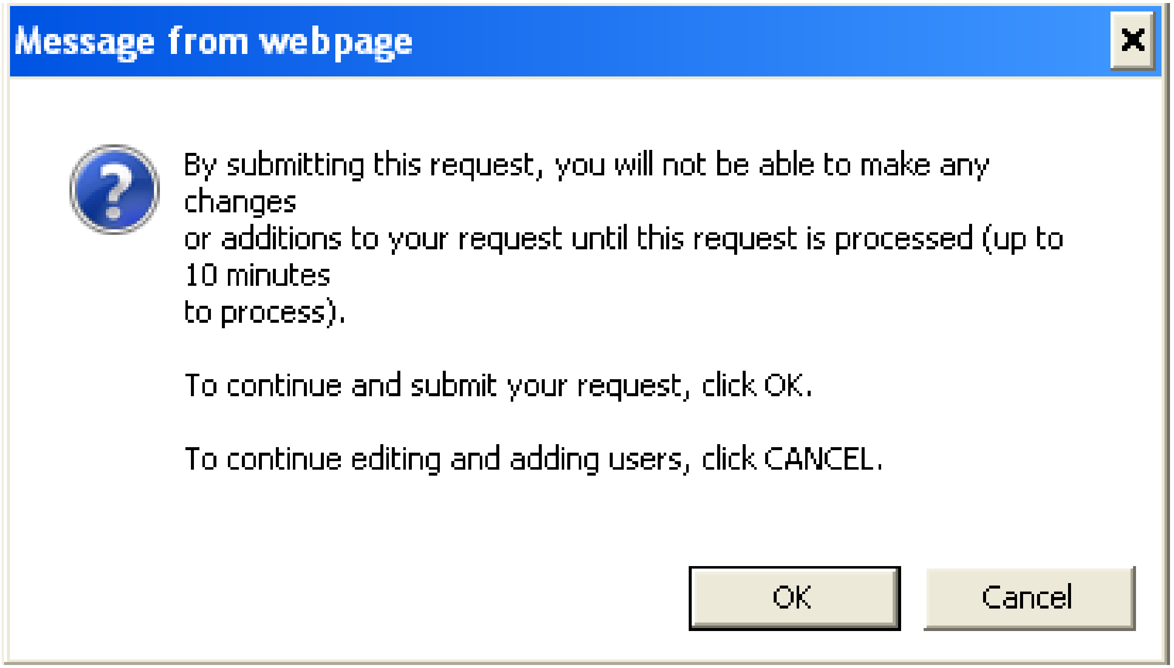
- MultiSuite Online Registration System (MSOR) (cont'd)

User Setup (cont'd)

After clicking "Submit," a message will appear acknowledging your request; click "OK" to submit your request:



Applications/Systems/Tool (cont'd)

- MultiSuite Online Registration System (MSOR) (cont'd)

User Setup (cont'd)

A confirmation message will appear to verify a successful submission:

- MultiSuite Online Registration System (MSOR) (cont'd)

User Setup (cont'd)

An email will be delivered to the SA to confirm completion of the request (see below); concurrently, an email will be delivered to the new user with the temporary password information:

Your MultiSuite authorization request has been completed

Database Admin

Extra line breaks in this message were removed.

Sent:

To:

Your recent MultiSuite user registration request has been completed. Any new users that you added have been e-mailed their temporary passwords. Each new user will need their unique MultiSuite ID which is provided in this e-mail.

If you have made modifications to a users' information or changed their access roles, the user will be notified of these changes via e-mail.

If you have inactivated a user, the user will not be notified.

If you would like to make additional changes, click on the following link and choose "MultiSuite Information".

https://multifamily.freddiemac.com/multisuite/

The following actions were completed on your MultiSuite user registration request:

--> Created new user Arthur Apple, ID-->jcgi_aapple, with the following access: Basic, Data Delivery, Investor Reporting View Only

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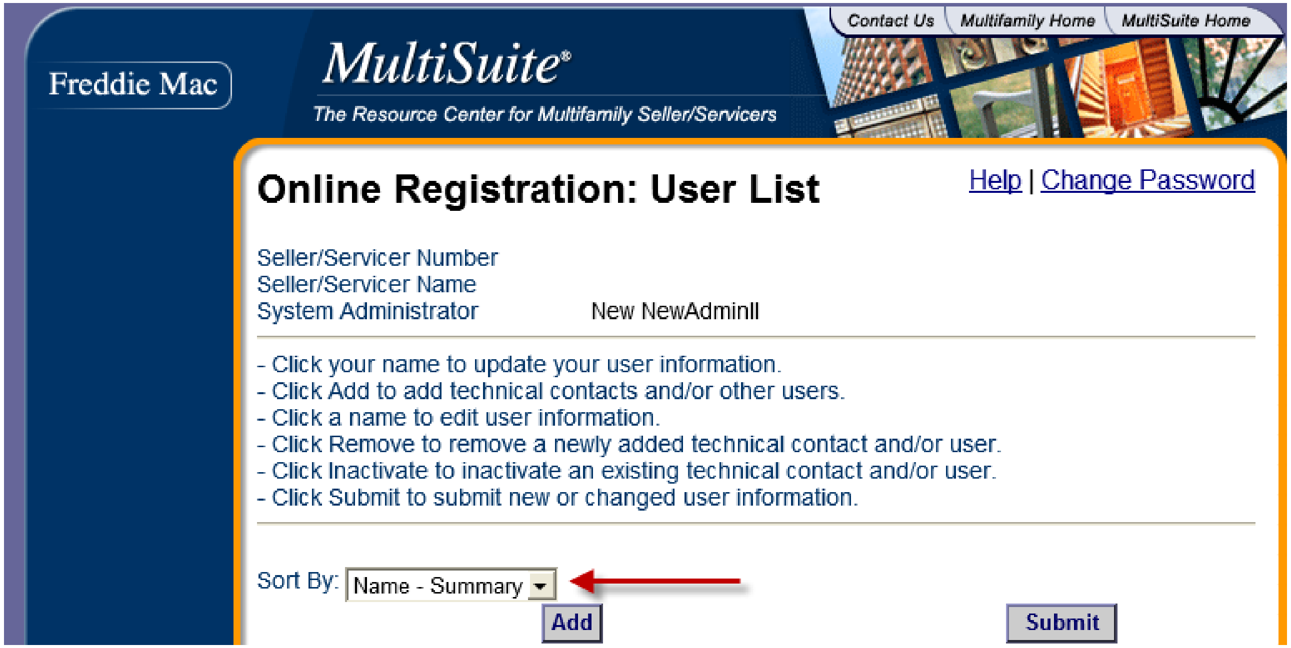
- MultiSuite Online Registration System (MSOR) (cont'd)

User Setup (cont'd)

After receiving the email, log into MSOR and change the Sort by view from "Name – Summary" to "User ID" in order to receive the new user ID:



- MultiSuite Online Registration System (MSOR) (cont’d)

User Setup (cont’d)

The SA will need to provide the user ID to the new user:

- Origination and Underwriting System (OUS)

  *Prerequisite***:** After assigning the data delivery role in MSOR, the system administrators have the ability to set up external user accounts and roles in OUS:

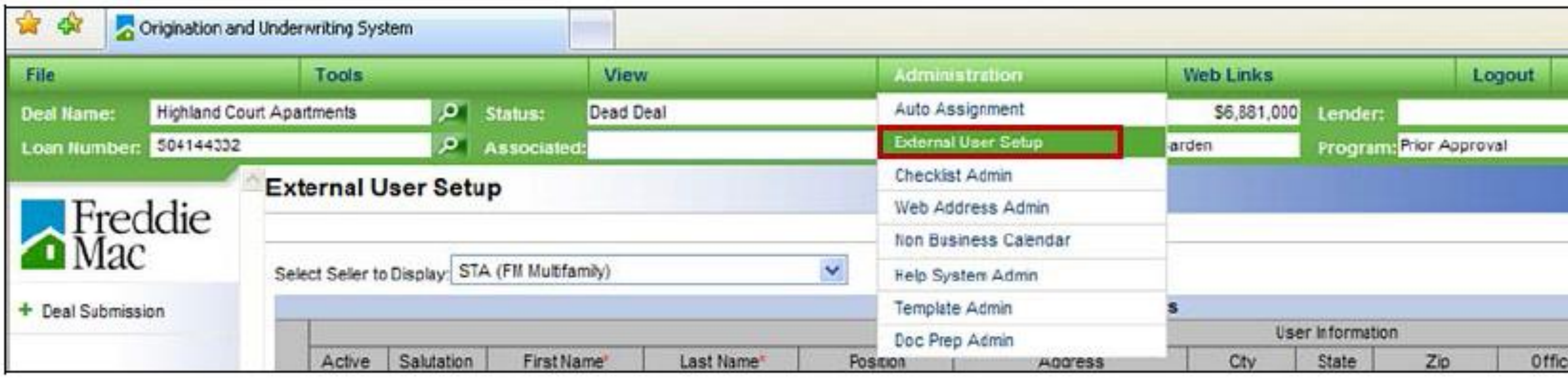
Note: *If the user's access needs to be deactivated, simply uncheck the box for the access rights that are no longer required.*

Applications/Systems/Tool (cont'd)

- Origination and Underwriting System (OUS)

Adding New Users

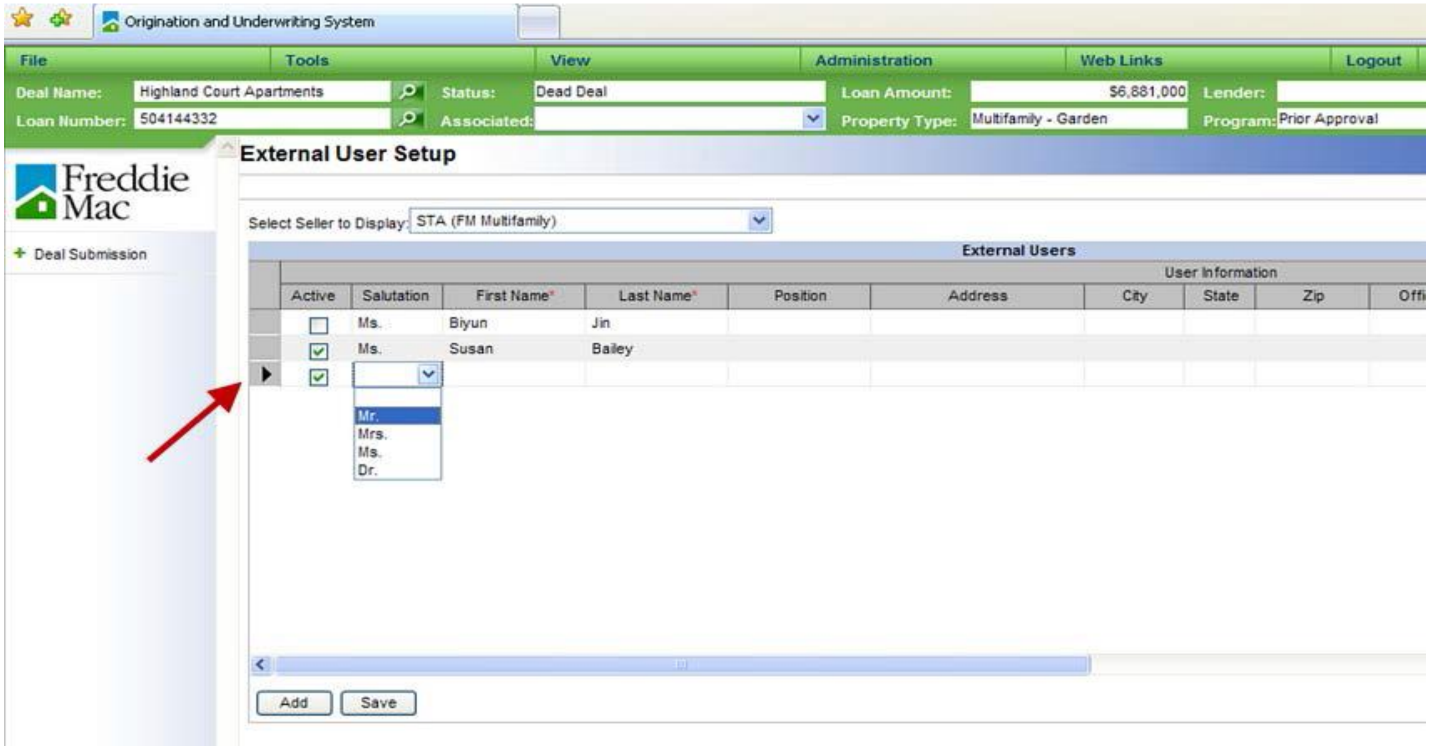
In the OUS navigation menu, select "Administration" then "External User Setup":



- OUS (cont'd)

Adding New Users (cont'd.)

In the new row that appears, click on the shaded cell in the first column to input data. Check the "Active" box in each field to enter user information; click "Save" when finished:



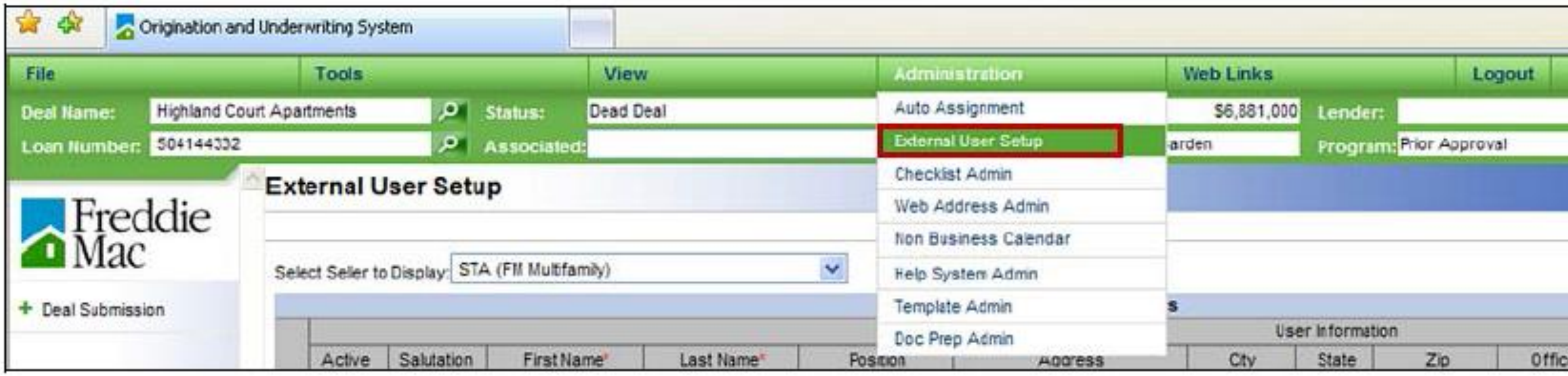
Note: *Fields with the* * *require data input. You need to enter the user's First Name, Last Name and Log In ID. The Log In ID must be the same as their MultiSuite ID.*

Applications/Systems/Tool (cont'd)

- OUS (cont'd)

Edit a User Account

In the OUS navigation menu, select "Administration" then "External User Setup":

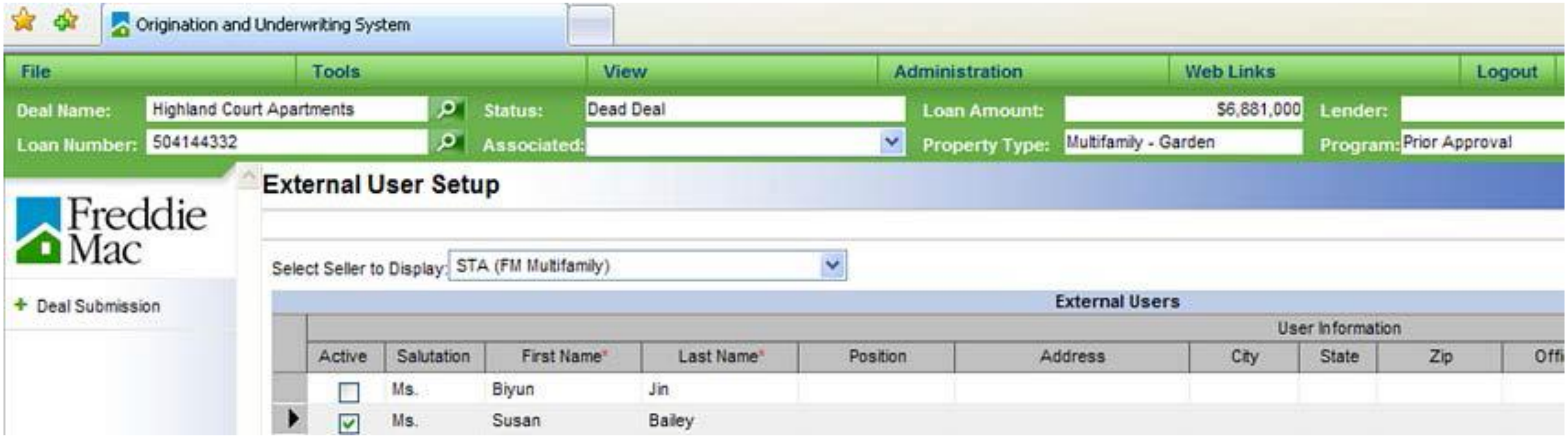


Applications/Systems/Tool (cont’d)

- OUS (cont’d)

Edit a User Account (cont’d)

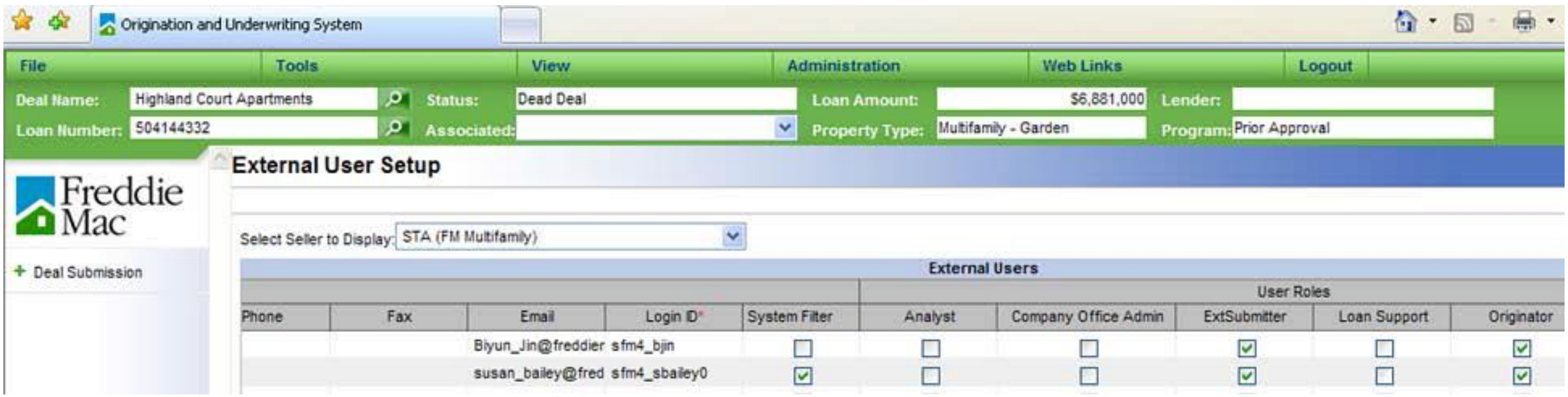
Select the shaded cell of the user account you want to modify on the “External User Setup” screen:



- OUS (cont’d)

Edit a User Account (cont’d)

Click the applicable field(s) for the “User Information” and edit as necessary; check/uncheck any changes to the “System Filter” or “User Roles;” click “Save” when finished:

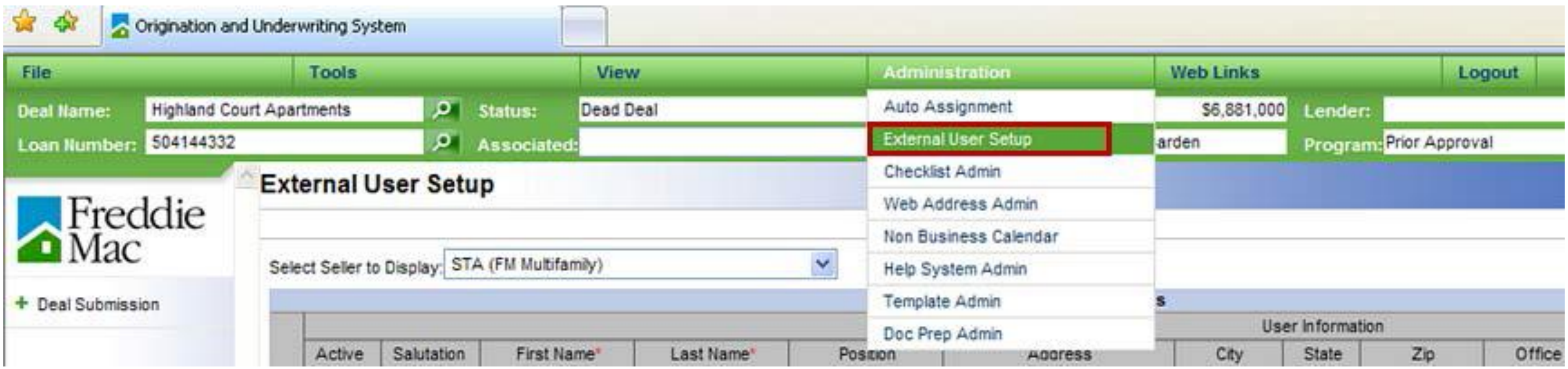


Applications/Systems/Tool (cont'd)

- OUS (cont'd)

De-activate a User Account

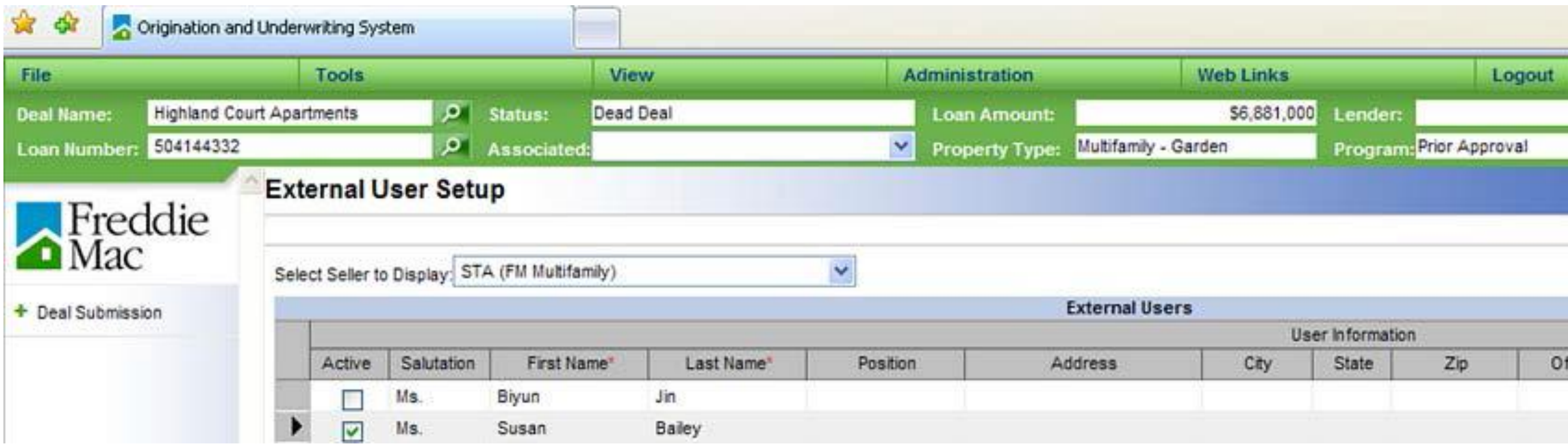
In the OUS navigation menu, select "Administration" then select "External User Setup":



- OUS (cont'd)

De-activate a User Account (cont'd)

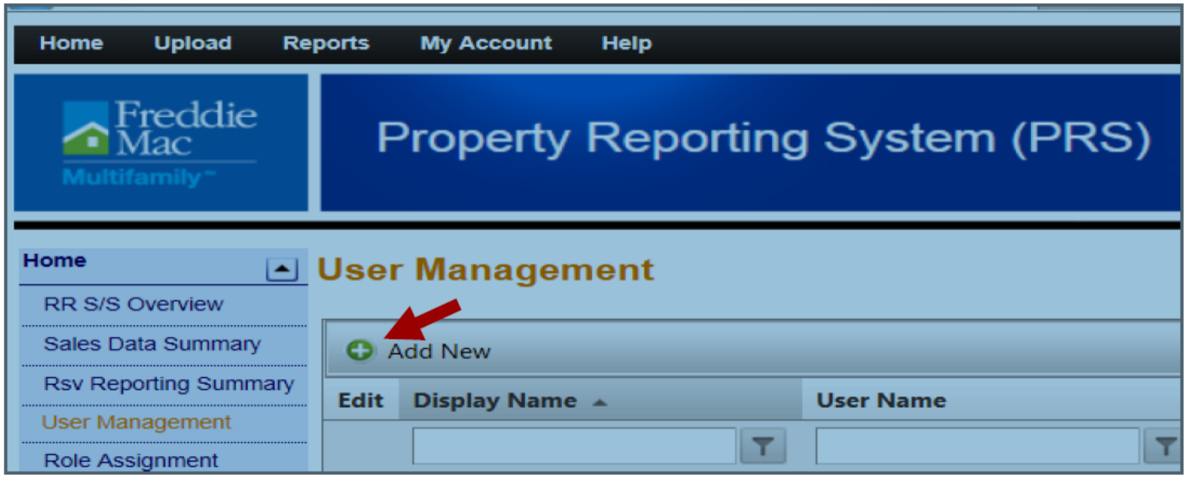
Select the shaded cell of the user account you want to de-activate and click the "Active" box to remove the check mark; click "Save" when finished:



- Property Reporting System/Reserve Reporting (PRS/RR)
  - 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.

    Adding New Users

    To add a new user to PRS, on the User Management page, click “Add New”:



Applications/Systems/Tool (cont'd)

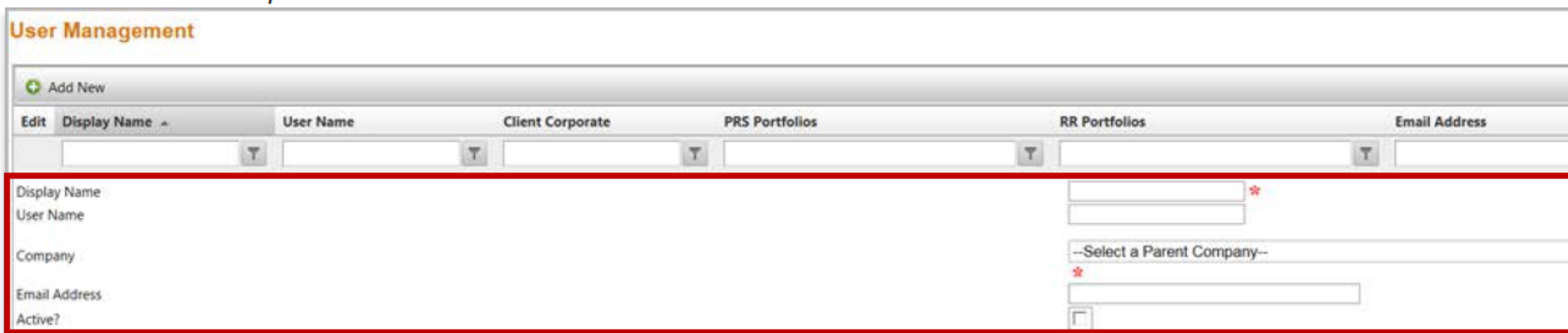
- Property Reporting System/Reserve Reporting (PRS/RR)

  Adding New Users (cont'd)

  The grid expands and allows you to enter:

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

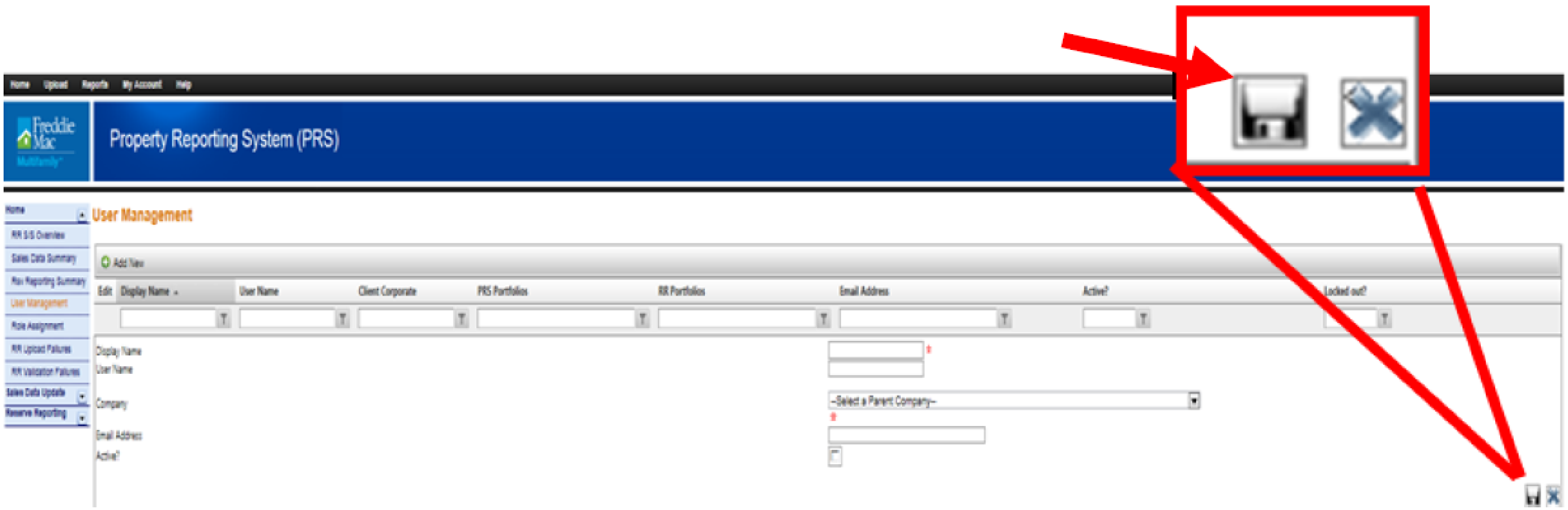
* *indicates a required field*



- Property Reporting System/Reserve Reporting (PRS/RR) (cont'd)

Adding New Users (cont'd)

Once completed, click the disk icon to save:



- Property Reporting System/Reserve Reporting (PRS/RR) (cont'd)

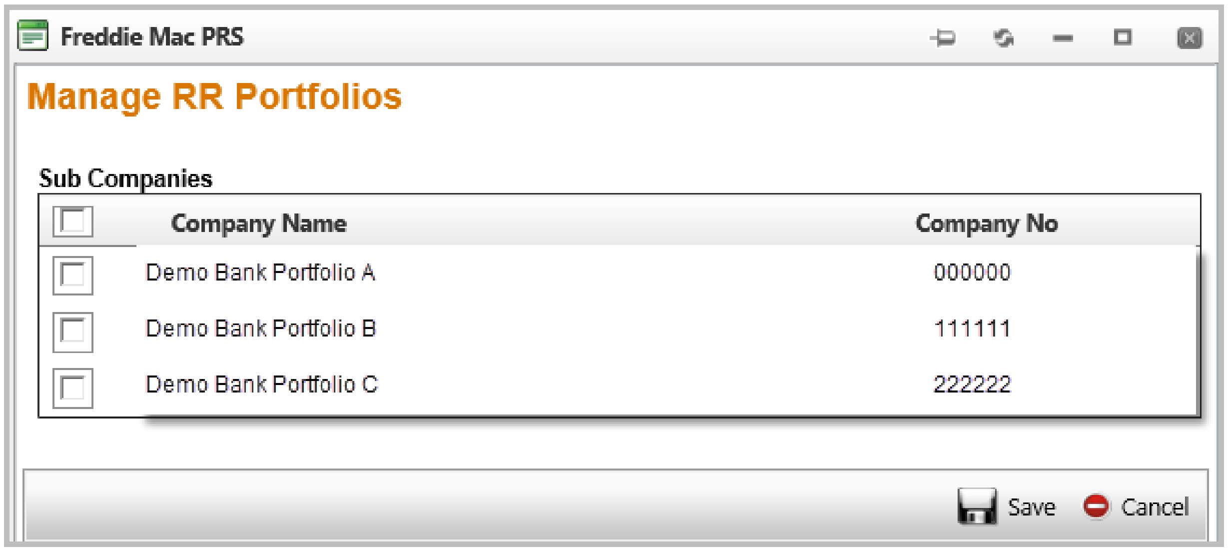
Assigning Servicer Portfolio(s)

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

- Property Reporting System/Reserve Reporting (PRS/RR) (cont'd)

Assigning Servicer Portfolio(s) (cont'd)

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

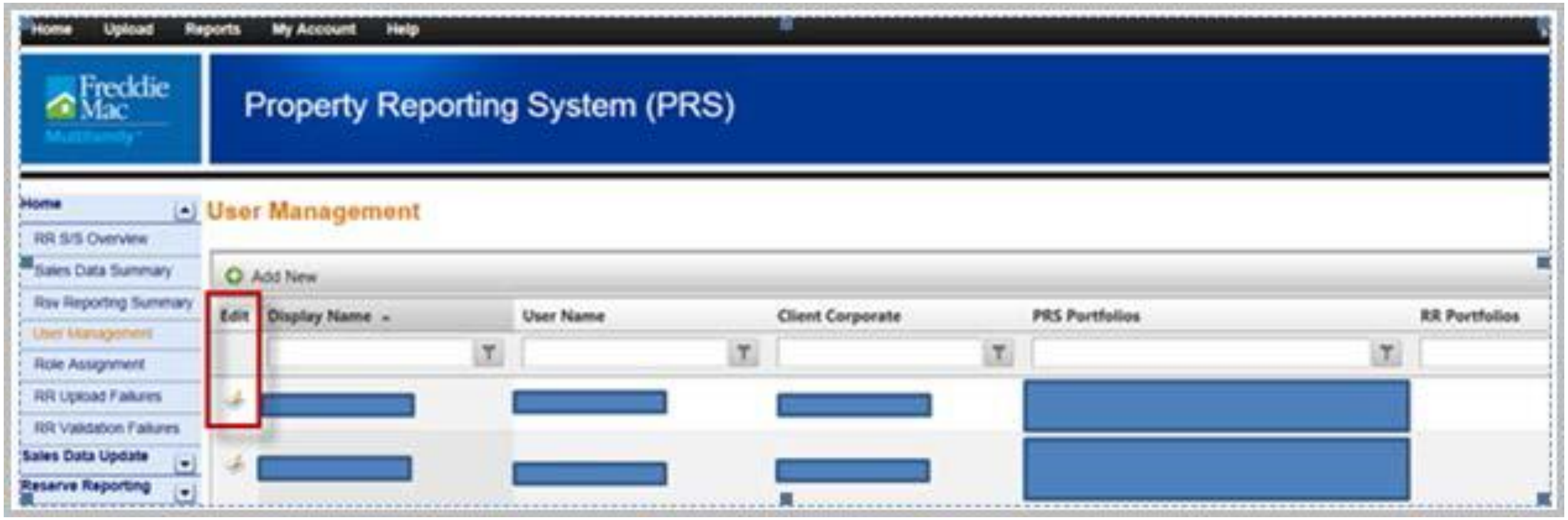


Applications/Systems/Tool (cont'd)

- Property Reporting System/Reserve Reporting (PRS/RR) (cont'd)

Editing Users

To edit a user, perform a search on the user name and click the "Edit" icon to edit the user's profile accordingly; once completed, click the disk icon to save the changes:

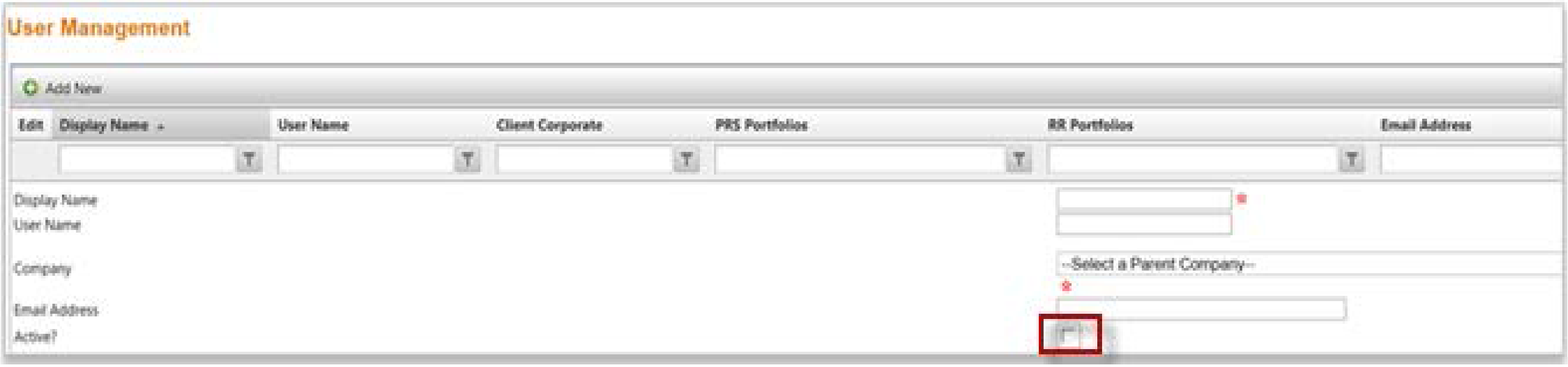


Applications/Systems/Tool (cont'd)

- Property Reporting System/Reserve Reporting (PRS/RR) (cont'd)

Making Users Inactive

To inactivate a user, perform a search on the user name and click the "Edit" icon; click the Active box to remove the checkmark and also 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.

Applications/Systems/Tool (cont'd)

- Property Reporting System/Reserve Reporting (PRS/RR) (cont'd)

Role Assignment

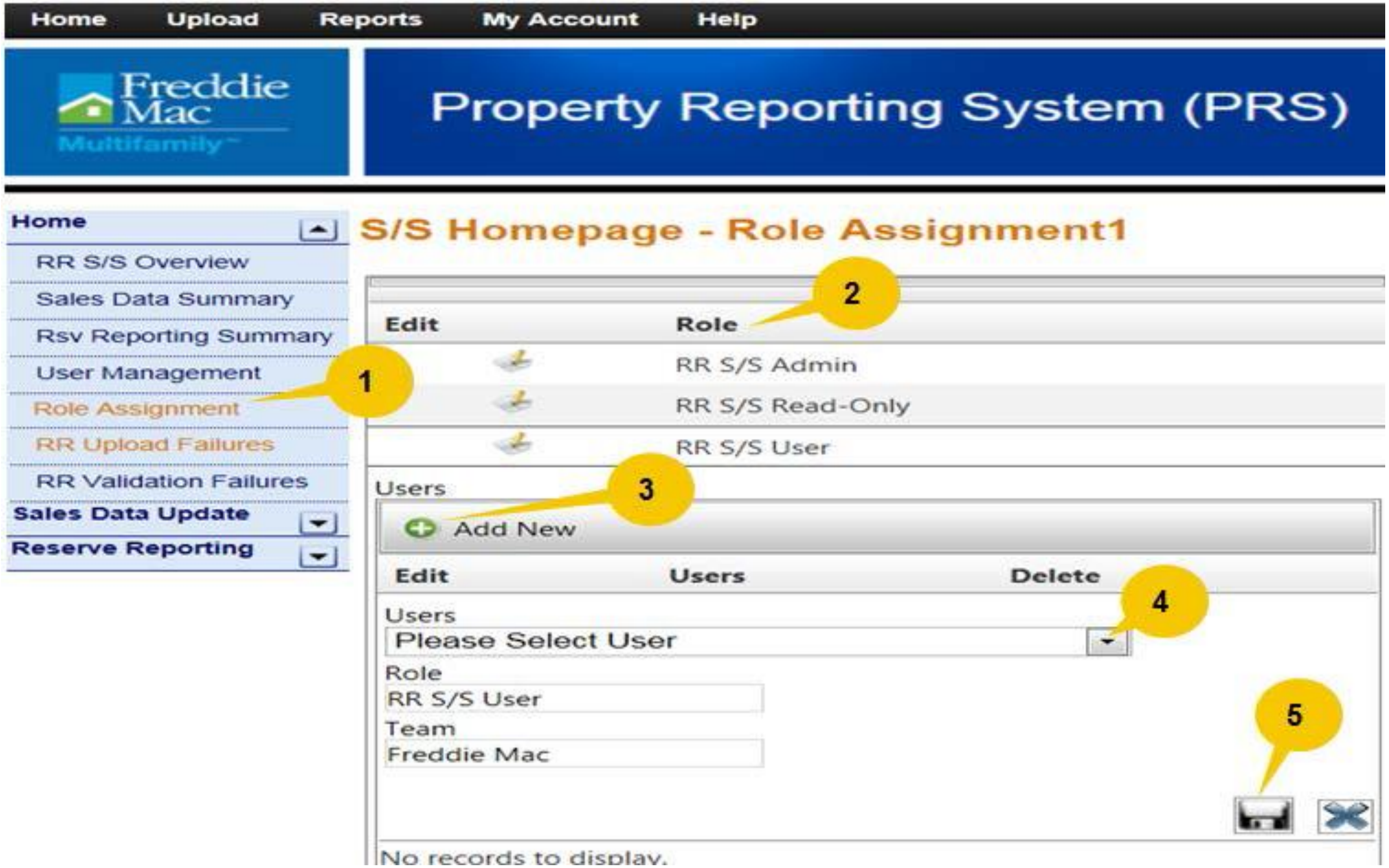
Before anyone can access PRS/RR, a role needs to be assigned to a user. To assign a role to a user:

1. Go to the Role Assignment page.
2. Select the appropriate role and click "Edit" to expand.
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.

Applications/Systems/Tool (cont'd)

- Property Reporting System/Reserve Reporting (PRS/RR) (cont'd)

Role Assignment



- Property Reporting System/Reserve Reporting (PRS/RR) (cont'd)

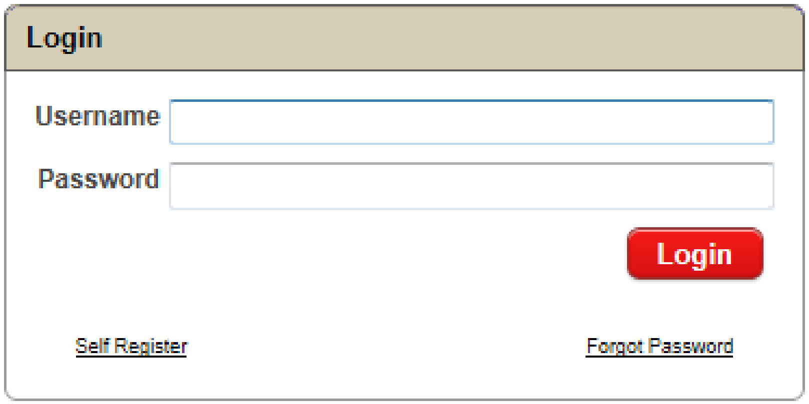
Reset User Password

To send the user a temporary password by email:

1. Go to the User Management page, right-click on the username and click "Reset Password."
2. The PRS system will automatically send a temporary password to the email address associated with the user.

Applications/Systems/Tool (cont'd)

- Multifamily Consent Request Tracker (CRT)
  - » Users **must** self register for the application using the Self Register link on the Login screen:



Note: *Only the initial SA can register as a system administrator. Any new SA should sign up as a new user and allow an existing SA to update a user role to the admin role.*

  - » System administrator can:
    - – Confirm or reject pending users
    - – Lock and deactivate users for their organization
    - – Update user information
    - – Assign user roles

Applications/Systems/Tool (cont'd)

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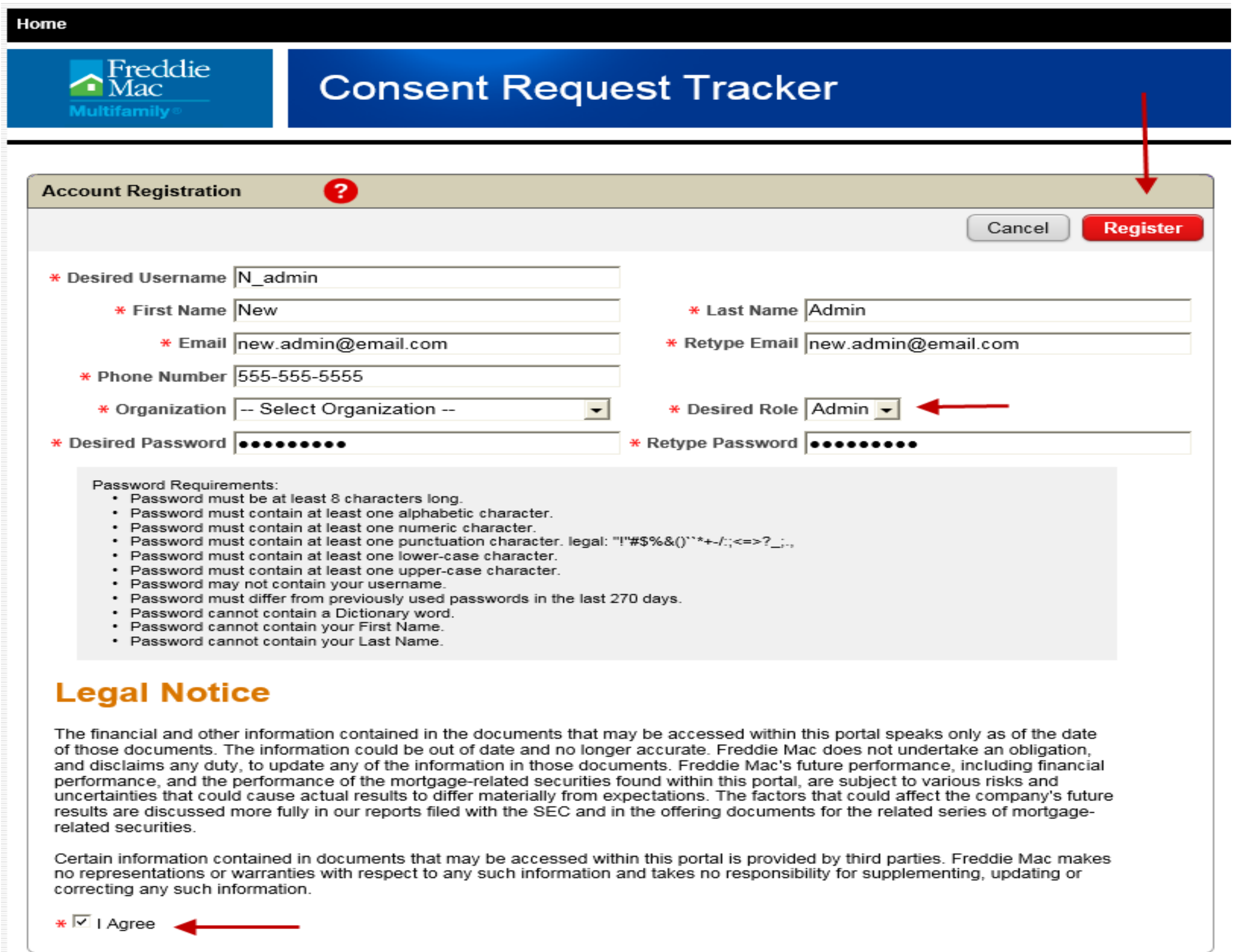
- Multifamily Consent Request Tracker (CRT) (cont'd)

New User Request

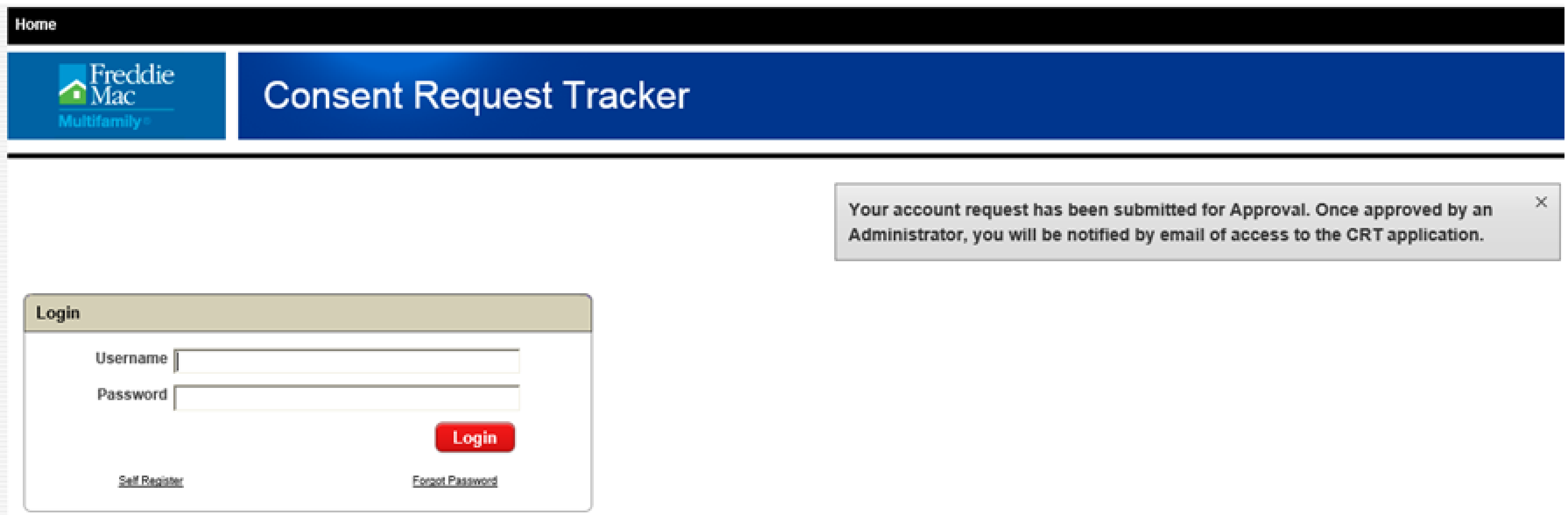


Note: *Fields with the * require data input. Before clicking the "Register" button, it is important that users select the correct role and check "I Agree" in the Legal Notice Section.*

- Multifamily Consent Request Tracker (CRT) (cont'd)

New User Request (cont'd)

After clicking register on the "Account Registration" screen, a notification of your request will appear on the login screen:



Applications/Systems/Tool (cont’d)

- Multifamily Consent Request Tracker (CRT) (cont’d)

New User Request

A confirmation email will be sent to users after Self registration:

CRT Username Request Confirmed.

crt_no-reply@ficonsulting.com

Sent:

To:

Freddie Mac Multifamily

Consent Request Tracker

To view the content of this message, please use an HTML enabled mail client.

Your account request with CRT has been confirmed. To access the application, please use the link:

Consent Request Tracker

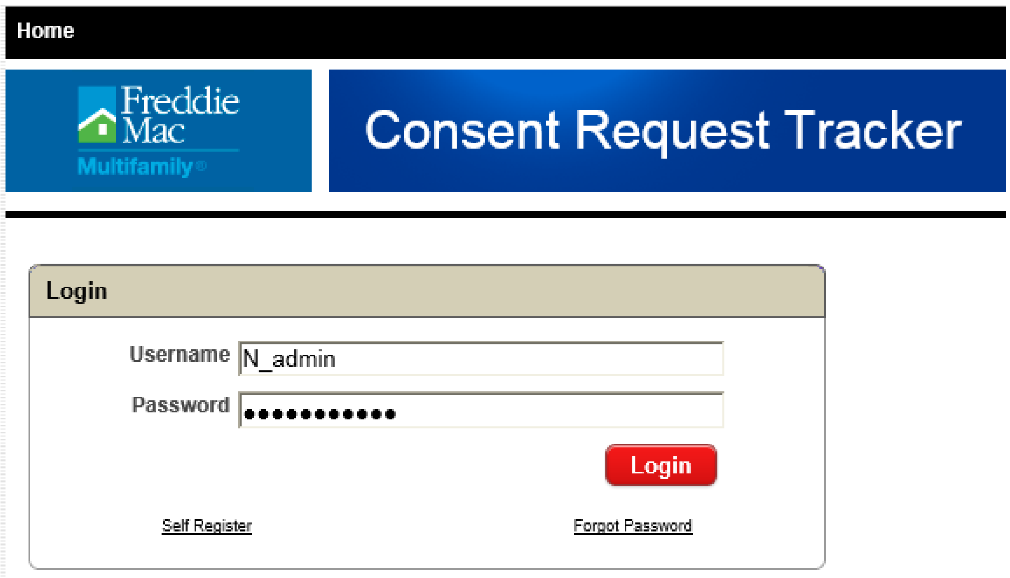
or type the following URL into your internet browser:

https://crt .ficonsulting.com/apex/f?p=CRT

- Multifamily Consent Request Tracker (CRT) (cont'd)

Confirm New User

To confirm a new user, the System Administrator logs into CRT:



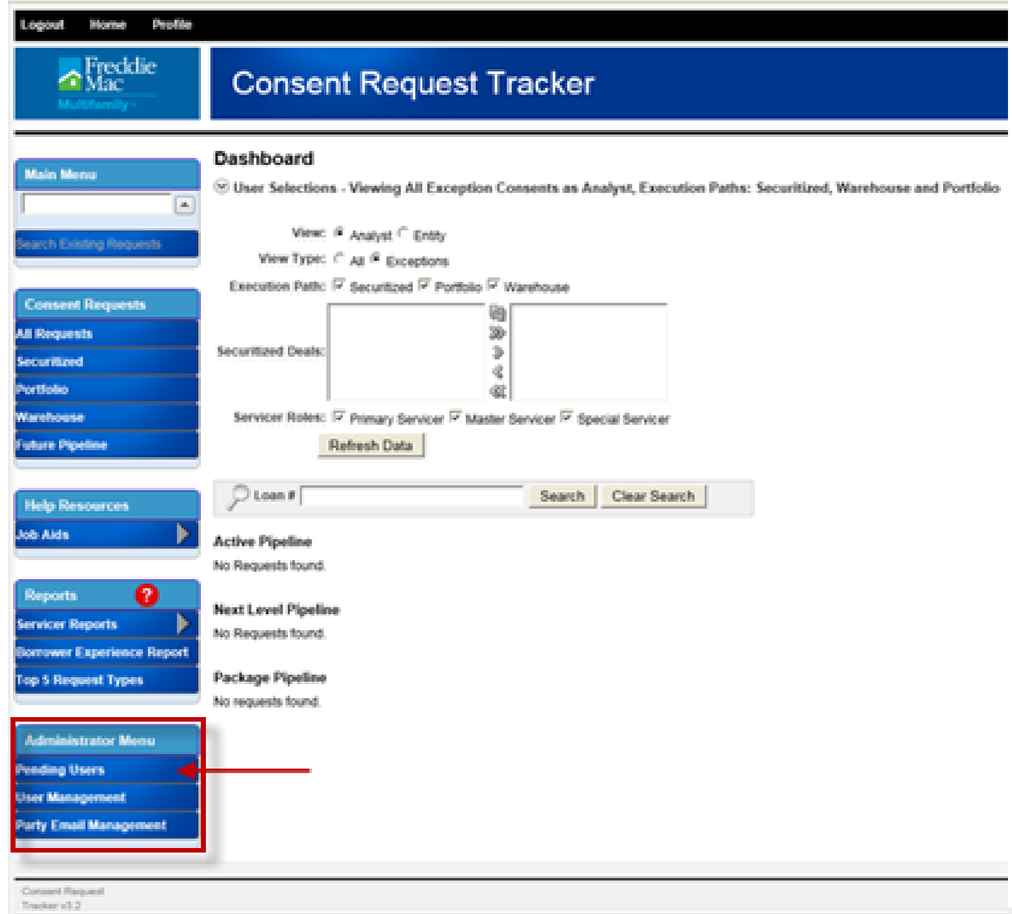
Note: *System administrators can confirm/update information for other users, but cannot update information for other system administrators. Once an SA is created by Freddie Mac, any new SA should sign up as a new user and allow an existing System administrator to update the user role to the admin role.*

Applications/Systems/Tool (cont'd)

- Multifamily Consent Request Tracker (CRT) (cont'd)

  Confirm New User (cont'd)

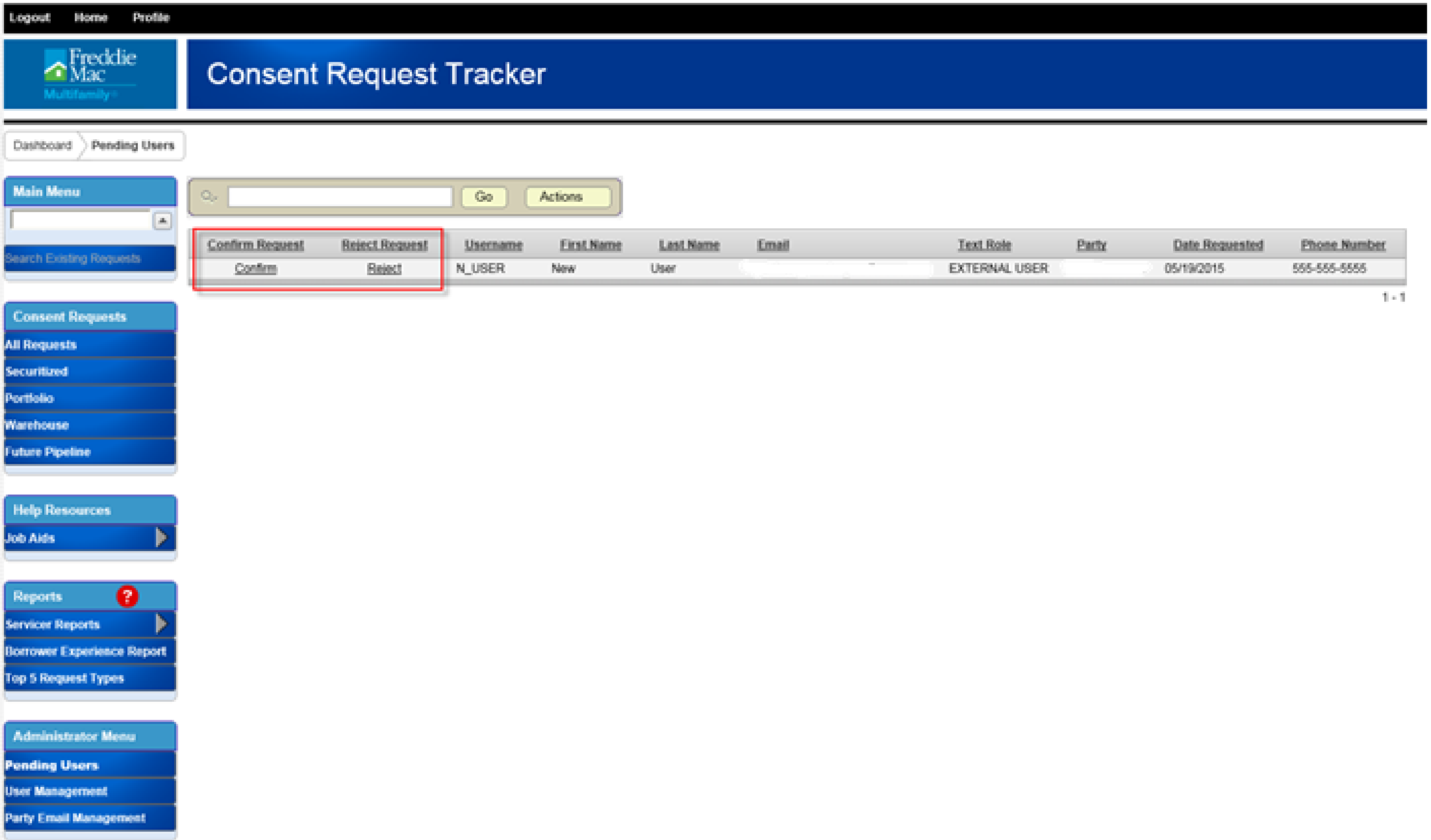
  In the CRT Dashboard view, select "Pending Users" in the Administrator Menu:



- Multifamily Consent Request Tracker (CRT) (cont'd)

Confirm New User (cont'd)

The "Pending Users" screen will have two options: Confirm or Reject Request; slect "Confirm":

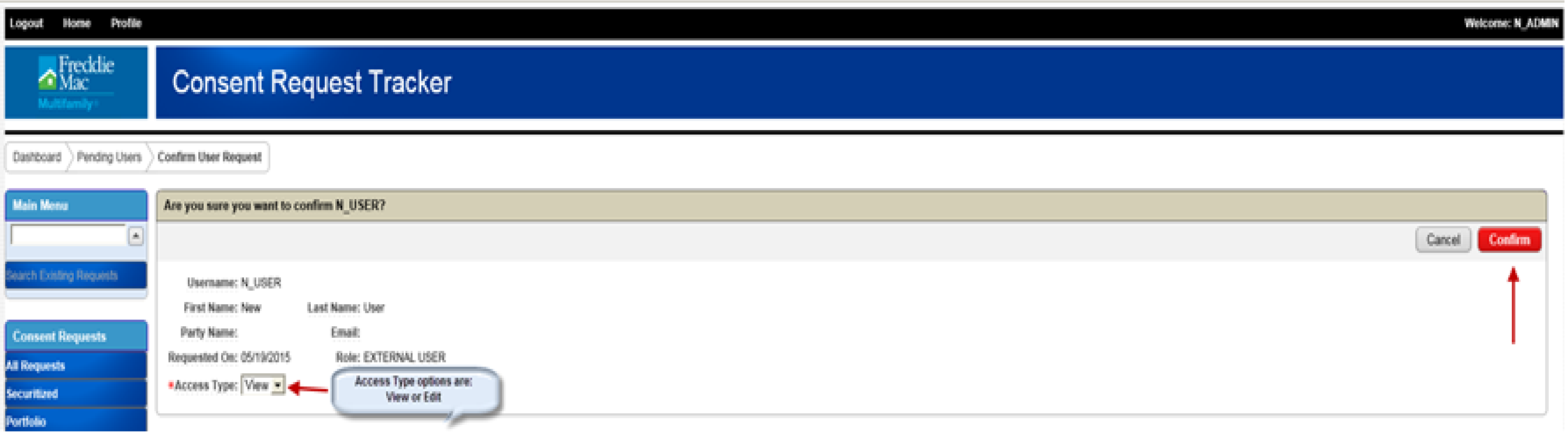


Applications/Systems/Tool (cont'd)

- Multifamily Consent Request Tracker (CRT) (cont'd)

  Confirm New User (cont'd)

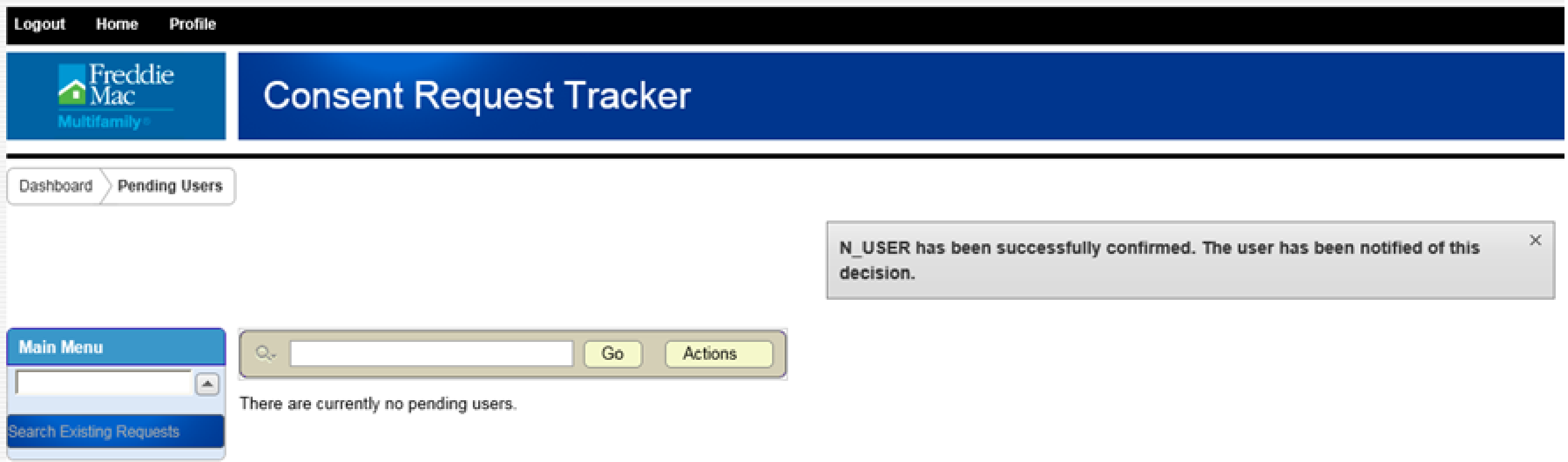
  In the "Confirm User Request" screen, select the Access Type and then click the "Confirm" button:



- Multifamily Consent Request Tracker (CRT) (cont'd)

Confirm New User (cont'd)

To confirm success, a successful submission pop-up message will appear:

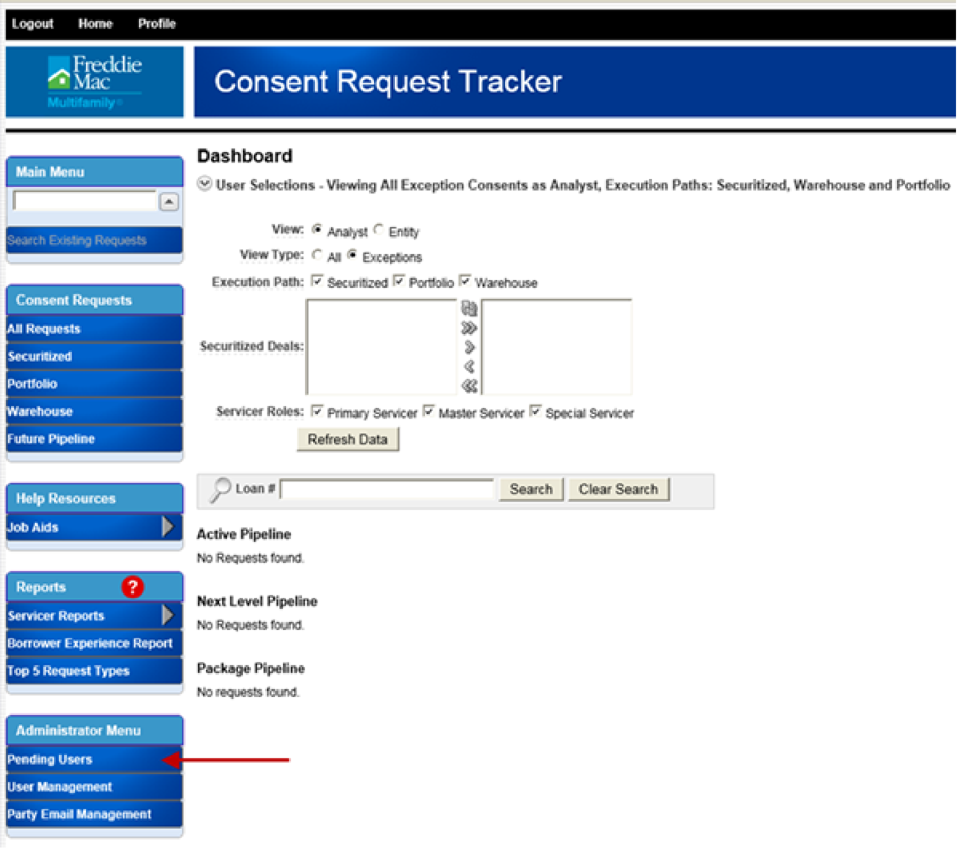


Applications/Systems/Tool (cont'd)

- Multifamily Consent Request Tracker (CRT) (cont'd)

Update User Role to Admin

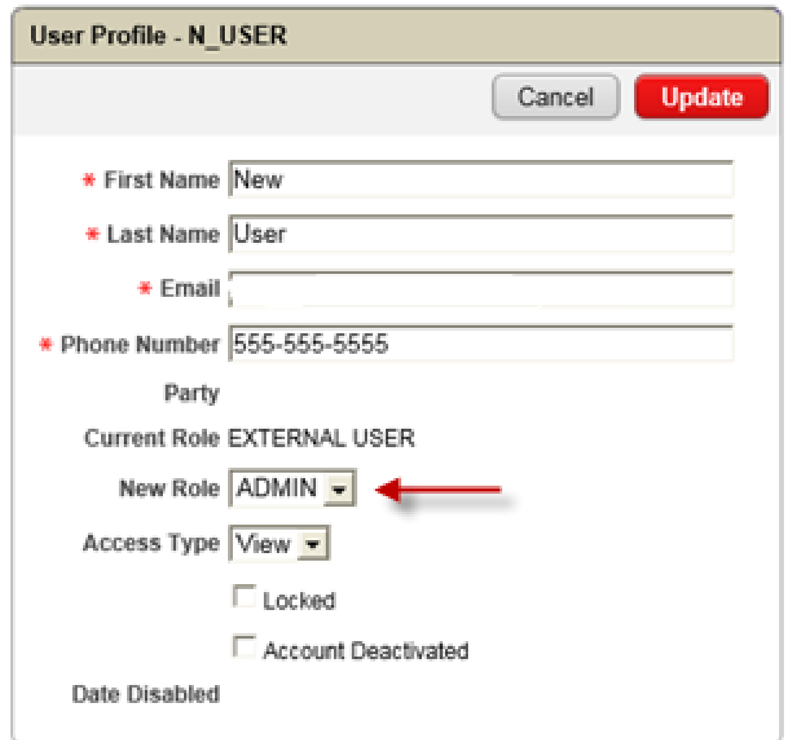
Select "User Management" in the Administrator Menu located on the Dashboard screen:



- Multifamily Consent Request Tracker (CRT) (cont'd)

Update User Role to Admin (cont'd)

In the User Management screen, change the **New Role** from "User" to "Admin":



- Multifamily Consent Request Tracker (CRT) (cont'd)

Update User Role to Admin (cont'd)

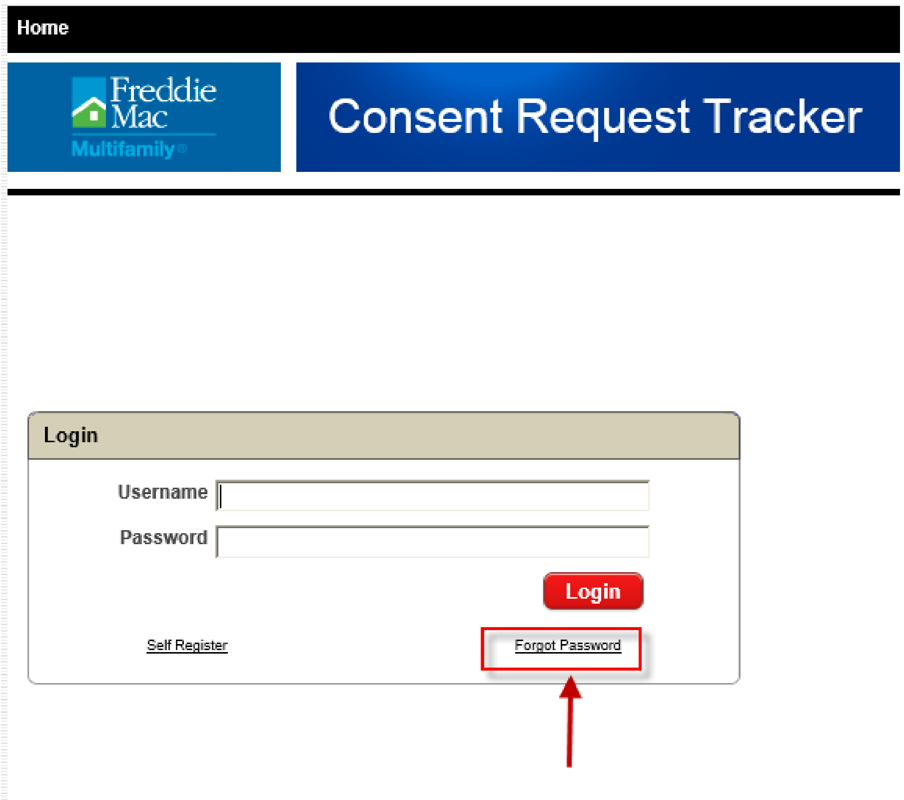
To confirm success, a successful submission pop-up message will appear:

Applications/Systems/Tool (cont'd)

- Multifamily Consent Request Tracker (CRT) (cont'd)

Password Reset

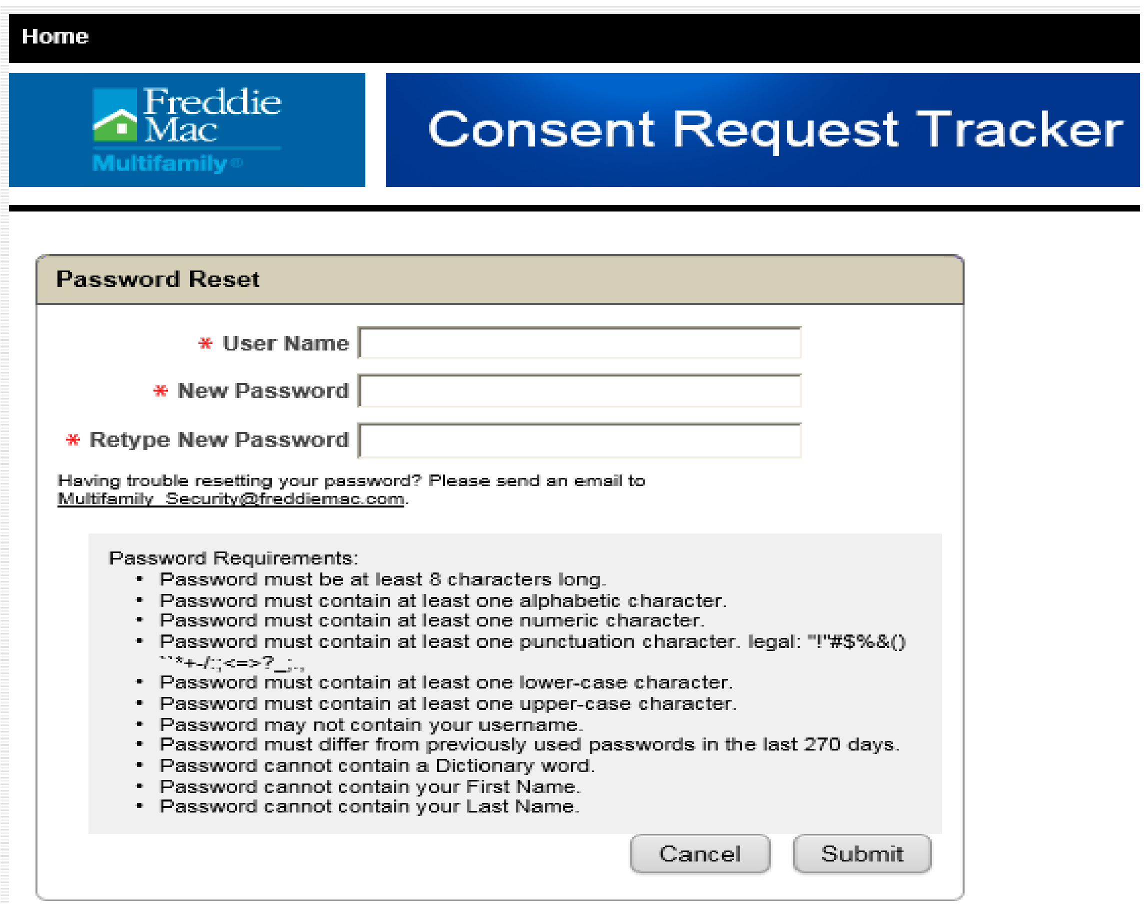
To reset a password, click "Forget Password" from the login screen:



Note: *Any user has the ability to reset his/her own password.*

- Multifamily Consent Request Tracker (CRT) (cont'd)

Password Reset (cont'd)



Home

Freddie Mac Multifamily

Consent Request Tracker

Password Reset

* User Name

* New Password

* Retype New Password

Having trouble resetting your password? Please send an email to Multifamily_Security@freddiemac.com.

Password Requirements:

- Password must be at least 8 characters long.
- Password must contain at least one alphabetic character.
- Password must contain at least one numeric character.
- Password must contain at least one punctuation character. legal: "!"#$%&() ``*+-/:;<=>?_;.,
- Password must contain at least one lower-case character.
- Password must contain at least one upper-case character.
- Password may not contain your username.
- Password must differ from previously used passwords in the last 270 days.
- Password cannot contain a Dictionary word.
- Password cannot contain your First Name.
- Password cannot contain your Last Name.

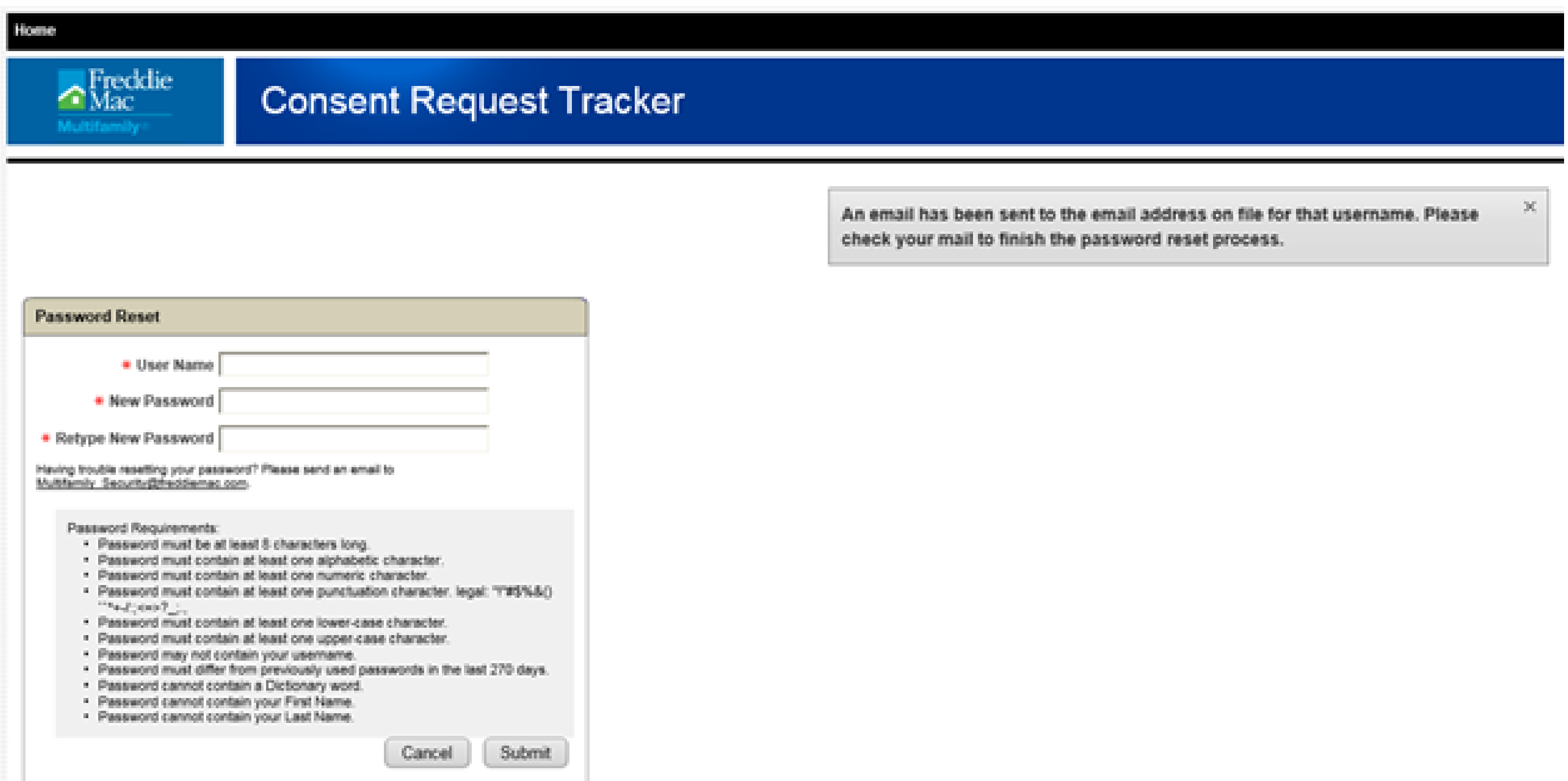
Cancel Submit

Note: *Fields with the * require data input. Before clicking the "Submit" button, it is important that the new password meets all of the Password Requirements.*

- Multifamily Consent Request Tracker (CRT) (cont'd)

Password Reset (cont'd)

An email will be sent to the address on file for the user name; it is important to confirm reset within ***two hours*** of receipt or the password will expire:



- Multifamily Consent Request Tracker (CRT) (cont'd)

Password Reset (cont'd)

CRT Password Reset Verification.

crt_no-reply@ficonsulting.com

Sent:

To:

Consent Request Tracker

To view the content of this message, please use an HTML enabled mail client.

Your password reset for CRT has been initialized but is not final until your confirm your reset. You must use this link within 2 hours or it will expire. If your link expires OR if clicking on the link fails to successfully confirm your reset, you will need to initialize a new password reset. Please click on the following link:

Consent Request Tracker

Copy/paste the URL below into your internet browser. If you are receiving a second email after clicking on the initial email was unsuccessful, please copy/paste or type the URL below into your internet browser:

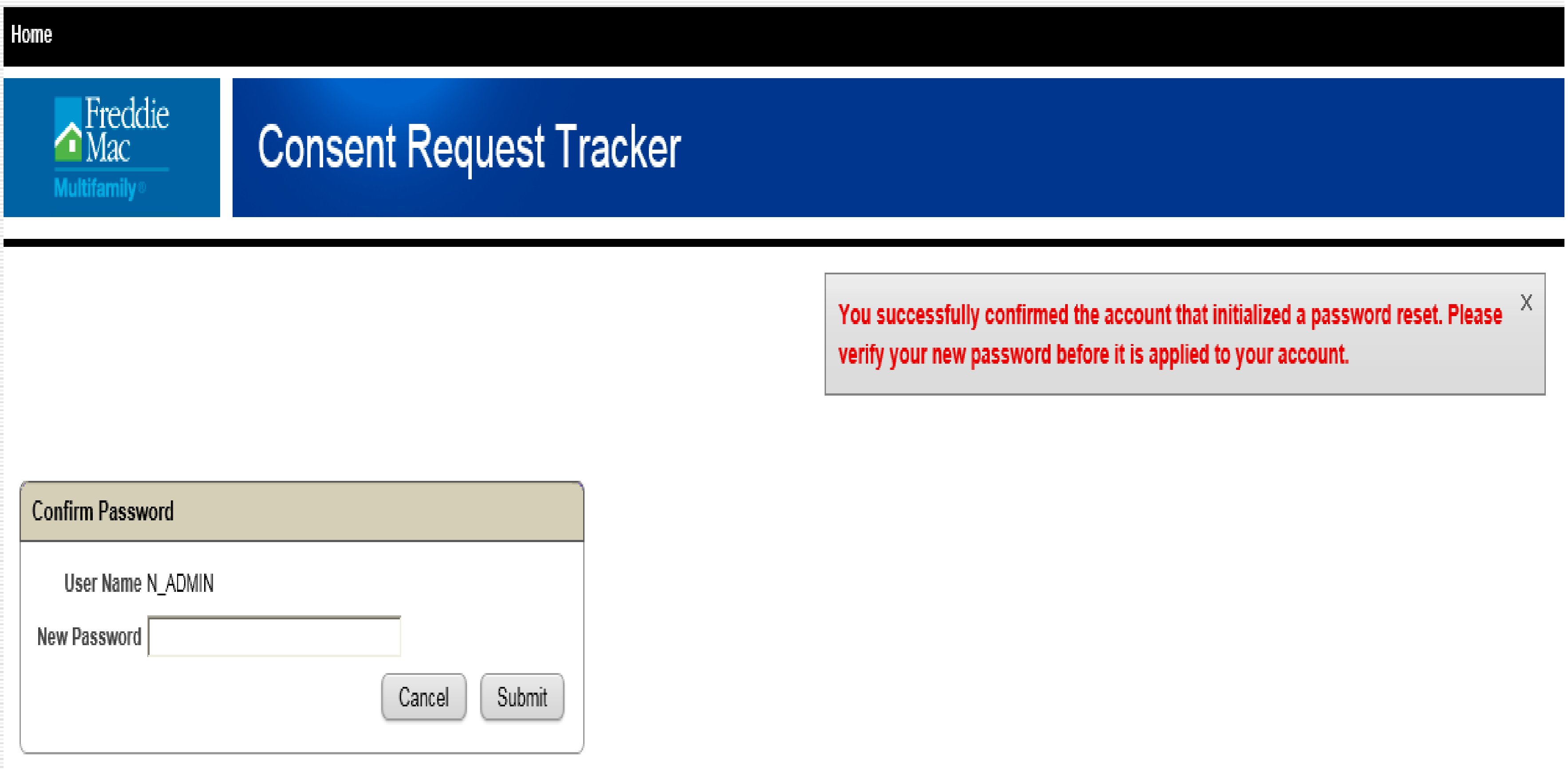
https://crt- .ficonsulting.com/apex/f?p=CRT:RESETPW:0:::APP:CONF_CODE:c8ad6dc3cb73363d267a8602a776febd94ee5628

Thanks,

The CRT Application Support Team

- Multifamily Consent Request Tracker (CRT) (cont'd)

Password Reset (cont'd)



Applications/Systems/Tool (cont'd)

As system administrator for both Multifamily's Document Management System and Insurance Compliance Tool, system administrators are only required to add/remove users. This is done by completing forms as follows:

- Multifamily Document Management System (DMS)
  - The DMS New User Setup, Reactivation and Deactivation Form allows system administrators to request, reactivate, and/or deactivate DMS access for one or more users. Once completed, click the "Submit Request" button on the form to submit the request to the Multifamily Service Desk.

- Multifamily Insurance Compliance Tool (ICT)
  - » For any new users that need access to ICT, the user account must first be created by the system administrator in the MultiSuite Online Registration System (MSOR):


View Role Type Definitions   Access Rights Descriptions

Role Type* — Technical Contact / User

Access Rights* — Basic, Data Delivery, ICT

NOTE: Only one of the following access rights can be selected — Investor Reporting, Investor Reporting View Only

* required field

Add/Update   Cancel

Note: *If the user's access needs to be deactivated, simply uncheck the box for the access rights that are no longer required.*

  - » Access the ICT User Access Request form via FreddieMac.com: [Technical Resources](). Once completed, submit request to [mf_service_desk@freddiemac.com]().

Applications/Systems/Tool (cont'd)

- Small Balance Loan Production Pipeline Manager (SBL PPM)
  - This is a self-registering system. Access is granted by Freddie Mac.
- Multifamily Securities Investor Access (MSIA)
  - This is a self-administered system; there are no required system administration duties related to MSIA.

Resources

Summary

Application/System/Tool	How to Manage Access/Update Contact Information	How to Reset Passwords
MultiSuite for Investor Reporting (MSIR)	Use Online Registration*	Use the Online Registration Password Reset function
Origination and Underwriting System (OUS)	Use Online Registration* to provide user access; activate/deactivate users in OUS	Use the Online Registration Password Reset function
Property Reporting System/Reserve Reporting (PRS/RR)	Use PRS*	Use PRS*
Consent Request Tracker (CRT)	Use CRT*	Use CRT*
Document Management System (DMS)	Complete the Multifamily DMS New User Setup and Deactivation, available on the Technical Resources page on FreddieMac.com, and submit it to: multifamily_security@freddiemac.com	Call 1-866-MultiFM (1-866-685-8436) and reference DMS or email multifamily_security@freddiemac.com

Resources

Application/System/Tool	How to Manage Access/Update Contact Information	How to Reset Passwords
Insurance Compliance Tool (ICT)	Complete the ICT User Access Request form, available on the Technical Resources page on FreddieMac.com, and return it to: mf_service_desk@freddiemac.com	Use the Online Registration Password Reset function
Small Balance Loan Production Pipeline Manager	Use SBL PPM*	Use SBL PPM*
Multifamily Securities Investors Access (MSIA)	Use MSIA	Use MSIA

*Freddie Mac will provide the system administrator with access to MultiSuite Online Registration, OUS, and PRS.

Applications/Systems/Tool (cont'd)

Contacts

- Call 1.866.MULTI-FM (866.685.8436), available from 8:00 am to 8:00 pm ET, Monday through Friday or email mf_service_desk@freddiemac.com.
- FreddieMac.com: Technical Resources