

Tools Tab

Inspection Report Tabs and Scope Presets section:

- 1 Removed existing options “Fannie Mae Assmt Addendum” and “FRE Assmt Addendum” and replaced with **Agency Assmt Addendum**.
- 2 Added new field **Repairs Verification Categories List** with corresponding “Normal” and “Freddie Mac” menu options.

Before

Inspection Report Tabs and Scope presets

Basic Inspection Fannie Mae Inspection
 Repairs Verification Freddie Mac Inspection

Select Report Tabs to be shown based on the scope of the inspection

<input checked="" type="checkbox"/> General Info	<input checked="" type="checkbox"/> Mgmt Interview	<input checked="" type="checkbox"/> Senior Housing Supplement
<input checked="" type="checkbox"/> Physical Condition & DM	<input checked="" type="checkbox"/> Multifamily	<input checked="" type="checkbox"/> Hospitals
<input checked="" type="checkbox"/> Photos	<input checked="" type="checkbox"/> Fannie Mae Assmt Addendum	
<input checked="" type="checkbox"/> Rent Roll	<input checked="" type="checkbox"/> FRE Assmt Addendum	
	<input checked="" type="checkbox"/> Repairs Verification	

Show all tabs

Tools | MBA Ratings | General Info | Physical Condition & DM | Photos | Rent Roll | Mgmt Interview | Multifamily

After

Inspection Report Tabs and Scope presets

Basic Inspection Fannie Mae Inspection
 Repairs Verification Freddie Mac Inspection

Select Report Tabs to be shown based on the scope of the inspection

<input checked="" type="checkbox"/> General Info	<input checked="" type="checkbox"/> Mgmt Interview	<input checked="" type="checkbox"/> Senior Housing Supplement
<input checked="" type="checkbox"/> Physical Condition & DM	<input checked="" type="checkbox"/> Multifamily	<input checked="" type="checkbox"/> Hospitals
<input checked="" type="checkbox"/> Photos	<input checked="" type="checkbox"/> Agency Assmt Addendum	
<input checked="" type="checkbox"/> Rent Roll	<input checked="" type="checkbox"/> Repairs Verification	

Show all tabs

2 Repairs Verification Categories list:
Normal
Freddie Mac

1

Tools | MBA Ratings | General Info | Physical Condition & DM | Photos | Rent Roll | Mgmt Interview | Multifamily | Agency Assmt Addendum

General Info Tab – Change 1

Subject Property Section:

- 1 Removed field **Rating Scale**.

Both Agencies now use the same Rating Scale.

Before

General Information	
Subject Property	
Property Name	<input type="text"/>
Property Address	<input type="text"/>
Street Address 2	<input type="text"/>
Property City	<input type="text"/>
State/Zip/Country	<input type="text"/> / <input type="text"/> <input type="text"/>
Overall Property Rating	<input type="text"/> Rating Scale <input type="text"/> MBA
Inspection Date / Time	<input type="text"/> / <input type="text"/>
Primary Property Type	<input type="text"/>
Secondary Type	<input type="text"/>

After

General Information	
Subject Property	
Property Name	<input type="text"/>
Property Address	<input type="text"/>
Street Address 2	<input type="text"/>
Property City	<input type="text"/>
State/Zip/Country	<input type="text"/> / <input type="text"/> <input type="text"/>
Overall Property Rating	<input type="text"/>
Inspection Date / Time	<input type="text"/> / <input type="text"/>
Primary Property Type	<input type="text"/>
Secondary Type	<input type="text"/>



General Info Tab – Change 2

Inspection Scheduling Contact Information section:

- 1 Added new field **In-House Inspection** along with corresponding “Yes” and “No” menu options.

Before

Inspection Scheduling Contact Information		Inspector Information	
Contact Company	<input type="text"/>	Inspection Company	<input type="text"/>
Contact Name	<input type="text" value="/"/>	Inspector's Name	<input type="text" value="/"/>
Contact Phone	<input type="text"/>	Inspection Co. Phone	<input type="text"/>
Contact Email	<input type="text"/>	Inspector's ID	<input type="text"/>

After

Inspection Scheduling Contact Information		Inspector Information	
Contact Company	<input type="text"/>	Inspection Company	<input type="text"/>
Contact Name	<input type="text" value="/"/>	Inspector's Name	<input type="text" value="/"/>
Contact Phone	<input type="text"/>	Inspection Co. Phone	<input type="text"/>
Contact Email	<input type="text"/>	Inspector's ID	<input type="text"/>
		In-House Inspection?	<input type="text" value=""/>
			<input type="text" value="Yes"/>
			<input type="text" value="No"/>



General Info Tab – Change 3

Management Company Information / On-Site Contact section:

- 1 Added new field **Email Address**.

Before

Management Company Information / On-Site Contact

Company Name	<input type="text"/>	Phone Number	<input type="text"/>
On-Site Contact	<input type="text" value="/"/>	Mgmt Interview	<input type="text"/>
Role or Title	<input type="text"/>	Length of time at property	<input type="text"/>
Mgmt Affiliation	<input type="text"/>	Mgmt company change since last inspection	<input type="text"/>

After

Management Company Information / On-Site Contact

Company Name	<input type="text"/>	Phone Number	<input type="text"/>
On-Site Contact	<input type="text" value="/"/>	Email Address	<input type="text"/>
Role or Title	<input type="text"/>	Mgmt Interview	<input type="text"/>
Mgmt Affiliation	<input type="text"/>	Length of time at property	<input type="text"/>
		Mgmt company change since last inspection	<input type="text"/>



General Info Tab – Change 4

Property Profile and Occupancy section:

- 1 Added six new menu options to **Rent Roll Obtained** field.
- 2 Added new menu option “**Mobile Home Pads**” to the Unit of Measurement Used field.
- 3 Fixed formatting error associated with Percentages field.
- 4 Relocated four existing fields within the section:
 - **Property Offers Rental Concession?**
 - **Describe**
 - **Franchise Name**
 - **Franchise change since last inspection?**

Before

Property Profile and Occupancy

Number of Buildings	<input type="text"/>	Annual Occupancy	<input type="text"/>
Number of Floors	<input type="text"/>	Annual Turn Over	<input type="text"/>
Number of Elevators	<input type="text"/>	Rent Roll Obtained	<input type="text"/>
Number of Parking Spaces	<input type="text"/>	Rent Roll Date	<input type="text"/>
Year Built	<input type="text"/>	Is Property Affordable Housing?	<input type="text"/>
Year Renovated	<input type="text"/>		
Unit of Measurement Used	<input type="text"/>	Total Percent Occupied	Percentages
Number of Units/Rooms/Beds	<input type="text"/>	Total Inspected	<input type="text"/>
Occupied Space	<input type="text"/>	Occupied Units Inspected	<input type="text"/>
Vacant Space	<input type="text"/>	Vacant Units Inspected	<input type="text"/>
Total Square Feet (Gross)	<input type="text"/>	If any Dark or Down space, describe:	
Total Square Feet (Net / Rentable)	<input type="text"/>	<input type="text"/>	
Is there any Dark space?	<input type="text"/>		
Is there any Down space?	<input type="text"/>		
Number of Down Units/Rooms/Beds	<input type="text"/>		
Property Offers Rental Concessions?	<input type="text"/>	Describe:	<input type="text"/>
Franchise Name	<input type="text"/>	Franchise change since last inspection?	<input type="text"/>

After

Property Profile and Occupancy

Number of Buildings	<input type="text"/>	Annual Occupancy	<input type="text"/>
Number of Floors	<input type="text"/>	Annual Turn Over	<input type="text"/>
Number of Elevators	<input type="text"/>	Rent Roll Obtained	<input type="text"/>
Number of Parking Spaces	<input type="text"/>	Rent Roll Date	<input type="text"/>
Year Built	<input type="text"/>	Is Property Affordable Housing?	<input type="text"/>
Year Renovated	<input type="text"/>		
Unit of Measurement Used	Mobile Home Pads	Total Percent Occupied	Percentages
Number of Units/Rooms/Beds/Pads	<input type="text"/>	Total Inspected	<input type="text"/>
Occupied Space	<input type="text"/>	Occupied Units Inspected	<input type="text"/>
Vacant Space	<input type="text"/>	Vacant Units Inspected	<input type="text"/>
Total Square Feet (Gross)	<input type="text"/>	If any Dark or Down space, describe:	
Total Square Feet (Net / Rentable)	<input type="text"/>	<input type="text"/>	
Is there any Dark space?	<input type="text"/>		
Is there any Down space?	<input type="text"/>		
Number of Down Units/Rooms/Beds	<input type="text"/>		
		Property Offers Rental Concessions?	<input type="text"/>
		Describe:	<input type="text"/>
		Franchise Name	<input type="text"/>
		Franchise change since last inspection?	<input type="text"/>

General Info Tab – Change 5

Operations and Maintenance Plans (O&M) section:

- 1 Relocated existing field **Was a harmful environmental condition observed which is not covered by an existing O&M plan (such as mold)?** from the now-defunct FRE Assmt Addendum tab.

Before

Operations and Maintenance plans (O&M)		
<i>Plans such as, but not limited to, Operations and Maintenance, Moisture Management and Environmental Remediation.</i>		
List of O&M Plan(s) Required in Loan Documents	Management Aware of Plan?	Plan Available?
1		
2		
3		
4		
5		

Specify additional O&M plans, and/or describe any observed O&M plan non-compliance.

After

Operations and Maintenance plans (O&M)		
<i>Plans such as, but not limited to, Operations and Maintenance, Moisture Management and Environmental Remediation.</i>		
List of O&M Plan(s) Required in Loan Documents	Management Aware of Plan?	Plan Available?
1		
2		
3		
4		
5		

Specify additional O&M plans, and/or describe any observed O&M plan non-compliance.

- 1

Was a harmful environmental condition observed which is not covered by an existing O&M plan (such as mold)?



General Info Tab – Change 6

Neighborhood and Site Comparison Data section:

- 1 Relabeled existing field Additional Collateral Description Information to **Additional Collateral Description Information, including comparison to neighborhood.**

Neighborhood and Site Comparison Data			
	Top 2 Major Competitors		Percent Use
1. Name or Type	<input type="text"/>	Single Family	<input type="text"/>
Distance	<input type="text"/>	Multifamily	<input type="text"/>
		Commercial	<input type="text"/>
2. Name or Type	<input type="text"/>	Industrial	<input type="text"/>
Distance	<input type="text"/>	Undeveloped	100%
Is the area declining or distressed?	<input type="text"/>		
Is there any new construction in the area?	<input type="text"/>		
Describe area, visibility, access, surrounding land use & overall trends (including location in relation to subject N, S, E, W)			
1			
Additional Collateral Description Information			
<input type="text"/>			

Neighborhood and Site Comparison Data			
	Top 2 Major Competitors		Percent Use
1. Name or Type	<input type="text"/>	Single Family	<input type="text"/>
Distance	<input type="text"/>	Multifamily	<input type="text"/>
		Commercial	<input type="text"/>
2. Name or Type	<input type="text"/>	Industrial	<input type="text"/>
Distance	<input type="text"/>	Undeveloped	100%
Is the area declining or distressed?	<input type="text"/>		
Is there any new construction in the area?	<input type="text"/>		
Describe area, visibility, access, surrounding land use & overall trends (including location in relation to subject N, S, E, W)			
1			
Additional Collateral Description Information, including comparison to neighborhood.			
<input type="text"/>			



Physical Condition and DM Tab – Change 1

Physical Condition Assessment and Deferred Maintenance section:

- 1 Relabeled existing field description for Curb Appeal from “Comparison to Neighborhood; First Impression/ Appearance” to **First Impression / Appearance**.
- 2 Relabeled existing field description for Interior Common Areas from “Public Restrooms” to **Common Area Restrooms**.
- 3 Relabeled existing field description for Environmental from “Evidence of Mold” to **Evidence of microbial growth**.
- 4 Removed comment fields “Exterior / Interior – Additional description of the property conditions” under Environmental.

Before	
Physical Condition Assessment and Deferred Maintenance	
Curb Appeal	
<i>Comparison to Neighborhood; First Impression / Appearance</i> 1	
Rating	Trend
Inspector Comments	
Interior Common Areas	
<i>Mailboxes; Reception Area; Lobby; Food Courts; Dining Areas; Kitchen; Halls; Stairways; Meeting Rooms; Storage; Basement; Healthcare Assistance Rooms; Pharmacy / Medication Storage; Nurses Station</i> <i>Public Restrooms;</i> 2	
Rating	Trend
Inspector Comments	
Environmental	
<i>Reported spills or leaks; Evidence of spills or leaks; Evidence of distressed vegetation; Evidence of mold; Evidence of O&M non-compliance</i> 3	
Rating	Trend
Inspector Comments	
Exterior - Additional description of the property conditions: 4	
Interior - Additional description of the property conditions:	

After	
Physical Condition Assessment and Deferred Maintenance	
Curb Appeal	
<i>First Impression / Appearance</i> 1	
Rating	Trend
Inspector Comments	
Interior Common Areas	
<i>Mailboxes; Reception Area; Lobby; Food Courts; Dining Areas; Kitchen; Halls; Stairways; Meeting Rooms; Restrooms; Storage; Basement; Healthcare Assistance Rooms; Pharmacy / Medication Storage; Nurses Station</i> <i>Common Area</i> 2	
Rating	Trend
Inspector Comments	
Environmental	
<i>Reported spills or leaks; Evidence of spills or leaks; Evidence of distressed vegetation; Evidence of microbial growth; Evidence of O&M non-compliance</i> 3	
Rating	Trend
Inspector Comments	

Physical Condition and DM Tab – Change 2

Deferred Maintenance Items table:

- 1 Changed table format from manual input to auto-populate (read-only) based on data sourced from the Photos tab.
- 2 Added new Life Safety column menu options to include **Life Safety (P)** and **Life Safety (I)**. *Life Safety data is input on the Photos tab and auto-populated into the DM Items table.*

Deferred Maintenance Items (4) 2 Life Safety, 1 Major Total Estimated Cost: \$ 2

		Rating	Life Safety	Photo	Estimated Cost
1	1	Major	Yes (P)	1	
2		Major	Yes (I)	2	
3		Minor	No	3	
4		Major	No	4	



Photos Tab – Change 1

Photos Tools

- 1 Removed buttons Delete All and Extract Photos and replaced with **Photos Tools** button that allows user to delete, move, or extract photos.

Before

MBA Standard Inspection Form

1

Delete All
Extract Photos

After

MBA Standard Inspection Form

Test Property Name, Test City, VA (Loan 107991)
Overall Rating: 1

1

Photos Tools

Select Option

Delete All Photos
Move Photos into place
Extract Photos to file

Cancel

Continue



Photos Tab – Change 2

Photos section:

- 1 Removed buttons Add to DM/RV List and replaced with **Options** button along with six corresponding photo category menu options to:
 - Allow user to insert and edit photos/captions
 - Auto-populate the Deferred Maintenance Items table (Physical Condition and DM tab) or the Verification Items table (Repairs Verification tab)

Before



Photo 1

Exterior

Add to DM list

Add to RV list

After



Add/Edit Category for Photo 4

Photo 4 Caption

Photo 4 Category

Routine Maintenance
DM: Minor
DM: Major
DM: Life Safety (P)
DM: Life Safety (I)
Roof

Est Cost

Cancel

Add/Update RV

Add/Update DM


1

Options

Photos Tab – Change 3

Photo Captions section:

- 1 Updated existing photo caption fields to:
 - Display deferred maintenance and repair data below the photo
 - Allow user to seamlessly move/change photos without having to manually realign the Deferred Maintenance or Verification Items tables



1

Steps to 2nd floor

DM: Minor
DM 1: Est. Cost \$500
RV 2: Partially - In Process

Rent Roll Tab

Photo Captions section:

- 1 Changed existing field **Rent Roll Attached** format from manual input to auto-populate (read-only) based on data sourced from the General Info tab / **Rent Roll Obtained** field.

Before	
Rent Roll	
Rent Roll Attached	Yes 1 <input type="text" value="(Select One)"/>
Rent Roll Summary Attached	Yes
Single Tenant Property	No
Hospitality Property	No
	Lease expires: <input type="text"/>
	YTD ADR: <input type="text"/>

After	
Rent Roll	
Rent Roll Attached	<input data-bbox="1651 815 2142 886" type="text" value=""/> 1
Single Tenant Property	<input type="text"/>
Hospitality Property	<input type="text"/>
	Lease expires: <input type="text"/>
	YTD ADR: <input type="text"/>



Management Interview Tab – Change 1

Management Information & Interview section:

- 1 Added new field **Where does Management work?** along with three menu options – “On-Site”, “Off-Site”, and “Rotational”.

Before		After	
<i>Management Information & Interview</i>			
Management Company Name	<input type="text"/>	Management Company Name	<input type="text"/>
Name of Information Source	<input type="text" value="/"/>	Name of Information Source	<input type="text" value="/"/>
Role or Title of Information Source	<input type="text"/>	Role or Title of Information Source	<input type="text"/>
Management Affiliation	<input type="text"/>	Management Affiliation	<input type="text"/>
		1 Where does Management work?	<input type="text"/>
		Neighborhood and Rental M	<input type="text"/>
		<input type="text"/>	In your opinion
			On-Site Off-Site Rotational
			Phone Nu Email Add Length of Mgmt cha pared to sim



Management Interview Tab – Change 2

Property Events section:

- 1 Added new comment field for question **In the past 12 months, has there been any key employee turnover or any key employee replaced? If yes, explain.**
- 2 Relabeled existing question field **In the past 12 months, have there been any fires, significant water intrusion or the property damage? If yes, explain the location on the property, costs associated, resolution, and leaseability.**
- 3 Added new question and associated comment fields **In the past 12 months, have there been any insurance claims filed? If yes, describe the damage, date of loss, and date claim was filed.**

Before	
Property Events	1
<input type="checkbox"/>	In the past 12 months, has there been any key employee turnover or any key employee replaced?
2	In the past 12 months, have there been any fires, significant water intrusion or other property damage? If yes, explain the location on the property, costs associated, any insurance claims submitted, resolution and leaseability:
<input type="text"/>	

After	
Property Events	
<input type="checkbox"/>	In the past 12 months, has there been any key employee turnover or any key employee replaced? If yes, explain. 1
<input type="checkbox"/>	In the past 12 months, have there been any fires, significant water intrusion or other property damage? If yes, explain the location on the property, costs associated, resolution, and leaseability: 2
<input type="text"/>	
<input type="checkbox"/>	In the past 12 months, have there been any insurance claims filed? If yes, describe damage, date of loss, and date claim was filed. 3
<input type="text"/>	



Management Interview Tab – Change 3

Management Information & Interview section:

- 1 Relocated question and associated comment fields **Per management, is the property out of compliance with any applicable ADA requirements? If yes, explain.** from the now-defunct FRE Assmt Addendum tab.
- 2 Added new question and associated comment fields **Any concerns with management responsiveness? If yes, please explain.**

<input type="checkbox"/>	Per management, is the property out of compliance with any applicable ADA requirements?
If yes, please explain:	
1	
<input type="checkbox"/>	Any concerns with management responsiveness?
If yes, please explain:	
2	



Agency Assmt Addendum Tab – Change 1

Comprehensive Property Assessment Ratings section:

- 1 Relabeled tab name from Fannie Mae Assmt Addendum to **Agency Assmt Addendum**.
- 2 Relabeled Life Safety menu option from “No/minor Life Safety issues observed” to **“No/isolated Life Safety issues observed”**.

Before

MBA Standard Inspection Form

1 **Fannie Mae Assessment Addendum**

Limitations of Field Assessment
Did you experience any of the following limitations to performing this field assessment: (Choose Yes/No)

<input type="checkbox"/>	Management unavailable for interview?
<input type="checkbox"/>	Management experience on the property is less than six months?
<input type="checkbox"/>	Occupied units were unavailable for assessment, or the total number of units available (occupied or unoccupied) was insufficient?
<input type="checkbox"/>	Significant portions of the common areas, amenities or basements, etc. were unavailable for assessment?
<input type="checkbox"/>	Snow was covering most exterior areas (parking lots, roofs, landscape areas)?
<input type="checkbox"/>	Other Limitation

Limitation Comment:

Comprehensive Property Assessment Ratings

Life Safety 2 **2. No/minor Life Safety issues observed**

Comment:

After

MBA Standard Inspection Form

Test Property Name, Test City, VA (Loan 107991)
Overall Rating: 1

1 **Agency Assessment Addendum**

Limitations of Field Assessment
Did you experience any of the following limitations to performing this field assessment: (Choose Yes/No)

<input type="checkbox"/>	Management unavailable for interview?
<input type="checkbox"/>	Management experience on the property is less than six months?
<input type="checkbox"/>	Occupied units were unavailable for assessment, or the total number of units available (occupied or unoccupied) was insufficient?
<input type="checkbox"/>	Significant portions of the common areas, amenities or basements, etc. were unavailable for assessment?
<input type="checkbox"/>	Snow was covering most exterior areas (parking lots, roofs, landscape areas)?
<input type="checkbox"/>	Other Limitation

Limitation Comment:

Comprehensive Property Assessment Ratings

Life Safety 2 **2. No/isolated Life Safety issues observed**

Comment:



Agency Assmt Addendum Tab – Change 2

Outstanding Major DM and Tenant Protections section:

- 1 Relocated existing question and associated comment fields **Are there any major deferred maintenance items outstanding from the last inspection? If Yes, please specify items that remain outstanding and include impact of outstanding items on overall property appeal and condition.** from the now-defunct FRE Assmt Addendum tab.

Outstanding Major DM & Tenant Protections

<input type="text"/>	Are there any major deferred maintenance items outstanding from the last inspection?
1	If Yes, please specify items that remain outstanding and include impact of outstanding items on overall property appeal and condition:



Repairs Verification Tab

Verification Items section:

- 1 Removed the **Photo** column.
- 2 Changed **Repair Status** column to display four additional fields and DM data for each repair line item.
DM data is input on the Photos tab and auto-populated into the Verification Items table.

Before			
Verification Items (0)			
Item Description and Location	Inspector Comments	Photo	Repair Status
1		1	2

After			
Verification Items (4)			
Item Description and Location	Inspector Comments	Repair Status	
1	V1 Pot holes	Photo:	1
		% Complete:	15%
		Status:	Partially - Halted
		Category:	Prior DM
		<i>DM: Minor</i>	
2	RV2 Steps to 2nd floor	Photo:	2
		% Complete:	50%
		Status:	Partially - In Process
		Category:	Repair Item
		<i>DM: Life Safety (P)</i>	
3	RV3 Loose shingles	Photo:	3
		% Complete:	100%
		Status:	Repairs Complete
		Category:	Hazard Loss
		<i>Roof</i>	



Senior Supplement Tab

Part IV: Management / Property Staffing section:

- 1 Changed four existing field formats from menu selection to free form text:
 - Scheduled meetings with staff
 - Social & Activities program for residents
 - Scheduled meetings with residents
 - Employee training opportunities

Part IV: Management

Are there written Policies & Procedures in place for the following:

Inspector's Discussion with Management Staff

	Yes / No / N/A	Comments
ADA & Fair Housing		
Contracting & purchasing		
Emergency evacuation		
Employee performance		
Incident reporting		
Resident care		
Transferring resident to/from assisted living		
Transferring resident to/from health care facility		

Property Budget

	Yes / No / N/A	Comments
Property annual budget (attach copy)		
Planned capital improvements in next 12 months		

Property Staffing

	Yes / No / N/A	If Yes, how often?
Scheduled meetings with staff		1
Scheduled meetings with residents		
Social & Activities program for residents		
Employee training opportunities		

