



# How to: Register, Quote, Close, and Deliver a Green Mortgage Loan

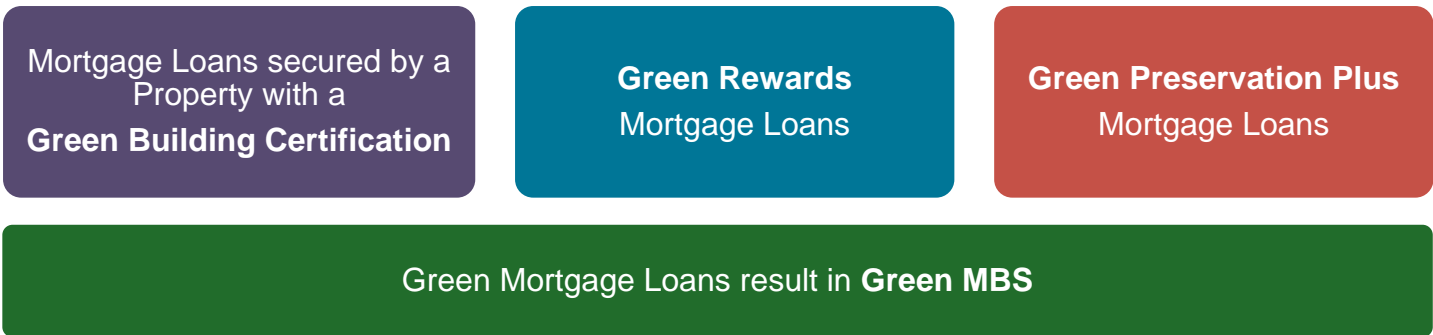
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### A. Green Financing Overview

Fannie Mae Multifamily [Green Mortgage Loans](#) provide financial incentives to borrowers strategically investing in Property improvements that reduce energy and water use and improve the Property’s quality and cash flow. All Green Mortgage Loans must be underwritten according to Fannie Mae’s Multifamily Selling and Servicing Guide, and disclosed as a [Green Mortgage Backed Security \(Green MBS\)](#).

A Green MBS has the same benefits as a traditional DUS MBS with the same Fannie Mae guaranty and appeals to sustainability-focused investors.



### B. Contact the Green Financing Team

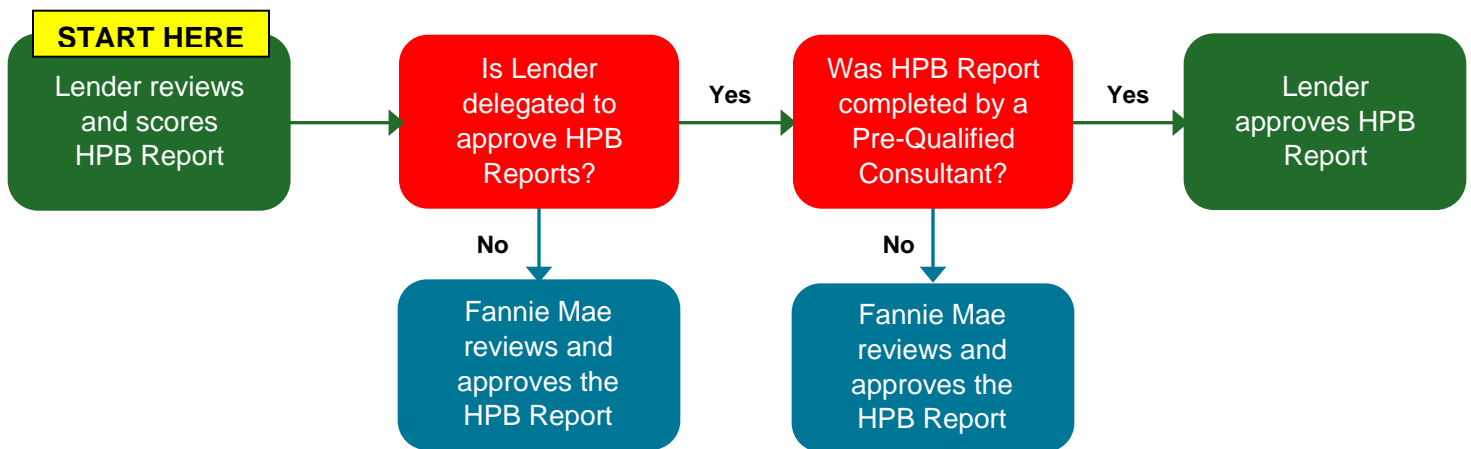
The Fannie Mae Green Financing Team can be reach via email at [green\\_financing@fanniema.com](mailto:green_financing@fanniema.com). Product term sheets and more can be found at: [www.fanniemaegreenfinancing.com](http://www.fanniemaegreenfinancing.com).



### C. How to determine whether your HPB Report approval is delegated

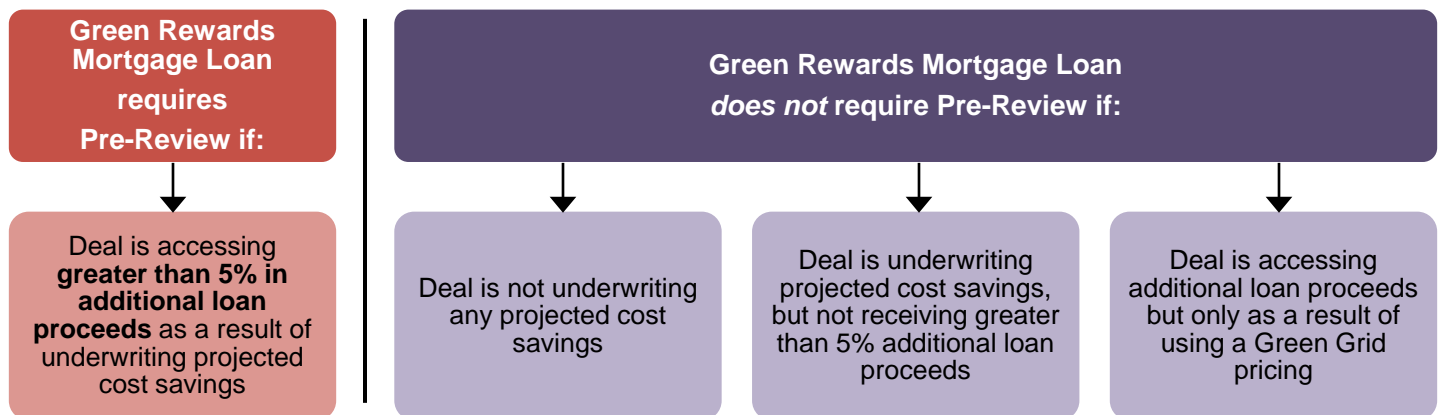
Approval is delegated when an experienced Lender reviews a report prepared by a Pre-Qualified Consultant.

- Experienced Lender: Lender has delivered Green Rewards Mortgage Loans that include a minimum of 8 HPB Reports. Contact your NAM to verify eligibility.
- Pre-Qualified Consultant: Consultant is pre-qualified when it has delivered 5 HPB Reports to Fannie Mae meeting quality standards. Pre-qualified consultants are listed on [www.fanniemae.greenfinancing.com](http://www.fanniemae.greenfinancing.com).



### D. How to determine if Pre-Review is required for a Green Rewards Mortgage Loan

A Green Rewards Mortgage Loan requires Pre-Review under certain conditions. Note that a Green Rewards Mortgage Loan may also require Pre-Review for other reasons unrelated to the Green financing component.





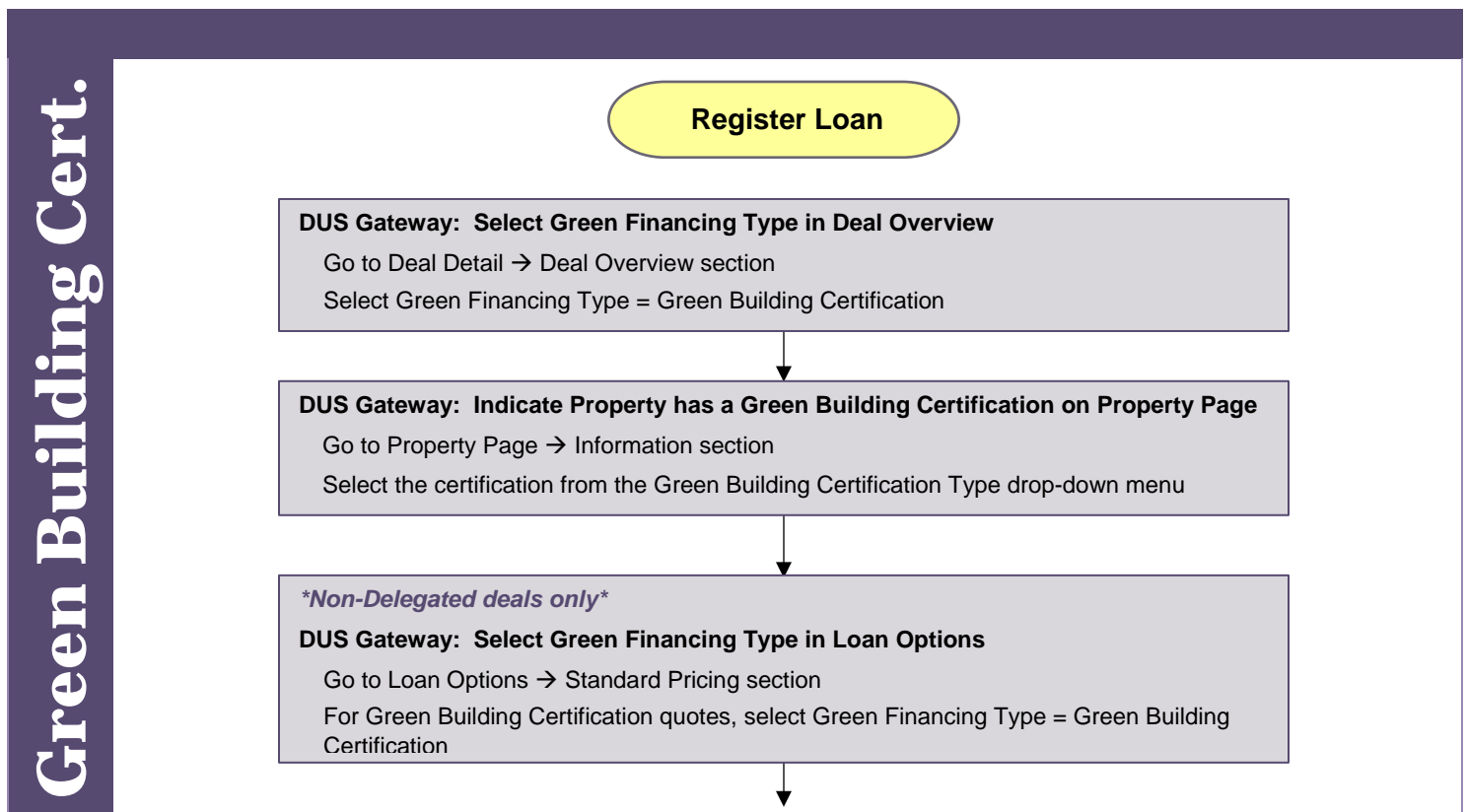
## E. HPB Report Cost Reimbursement

Fannie Mae reimburses 100% of the cost of the [High Performance Building \(HPB\) Report](#) (or the incremental cost of the HPB Module over the cost of the base Property Condition Assessment when the HBP Report is delivered as part of the PCA) for all Green Rewards Mortgage Loans and Green Preservation Plus Mortgage Loans. To receive reimbursement for an HPB Report:

1. Request an invoice from the HPB Report vendor with the HPB Report listed as a separate line item from any other report costs. Fannie Mae will not reimburse other costs such as fees for expediting a report.
2. Any time after the Mortgage Loan Origination Date, complete [Form 4829](#) with Lender information, either Fannie Mae commitment number or Fannie Mae loan number, Property information, wiring instructions, and indicate the HPB Report cost as "Other". Fields related to servicing may be left blank.
3. Manually sign or e-sign Form 4829 and scan or save as a PDF file.
4. E-mail the signed PDF Form 4829 and HPB Report Invoice to [HPB\\_Reimbursement@fanniemae.com](mailto:HPB_Reimbursement@fanniemae.com).

Fannie Mae processes reimbursement requests once a month. Depending on when the Mortgage Loan was delivered and when Form 4829 and the HPB Report Invoice were received, reimbursement may be received by Lender up to 2 months after the purchase of the Mortgage Loan by Fannie Mae.

## F. Mortgage Loan secured by a Property with a Green Building Certification: How to register, quote, close, and deliver





# Green Building Cert. (continued)

## DUS Gateway: Create Green Building Certification Waiver

Lender Delegated: Yes  
Category: Guide (other)  
Sub-Category: Green Mortgage Loans (Guide)  
Descriptor: Green Building Certification  
Guide (other) Comments: Indicate level and type of Green Building Certification

## *If requesting for a pricing waiver to consider the Green Building Certification*

Waiver Comments: List the level and type of the Green Building Certification  
(i.e., "Fannie Mae Green Level 2, LEED Homes Gold")

**Close Loan**

**Deliver Loan**

## Acquisition Systems: Indicate Green Building Certification Type

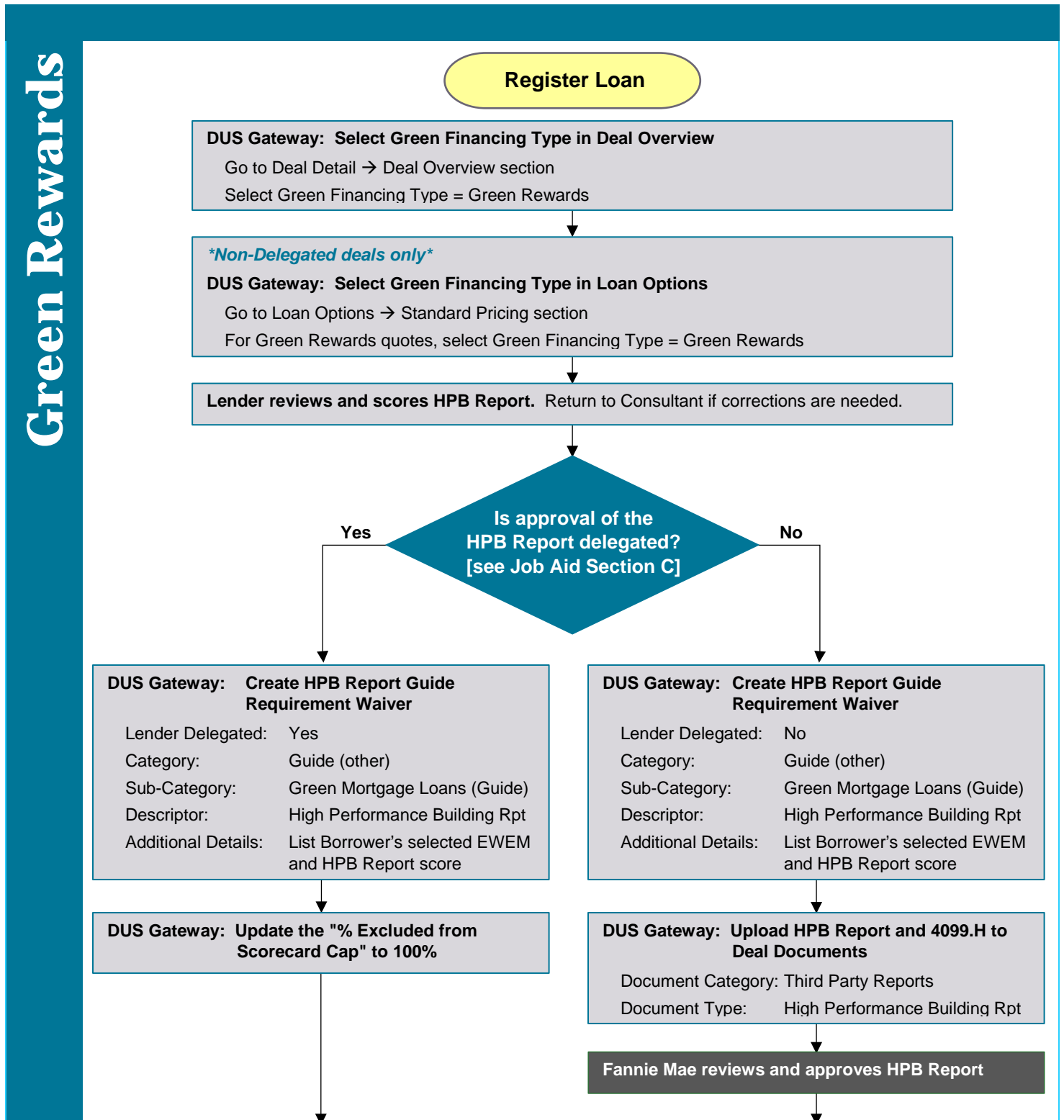
**C&D:** Go to Collateral tab → Collateral record → Property Data section  
Select the correct Certification from the Green Building Certification drop down menu  
**MSFMS:** Go to Collateral tab → Collateral record → Property Data section  
Select the correct Certification from the Green Building Certification drop down menu  
*\*Note: Do not select a Green Financing Type on the Loan tab in either system\**

## DUS DocWay: Upload Green Building Certification with Folder II delivery package

Upload to the Compliance/Certification tab with Doc Type "Green Building Certification"

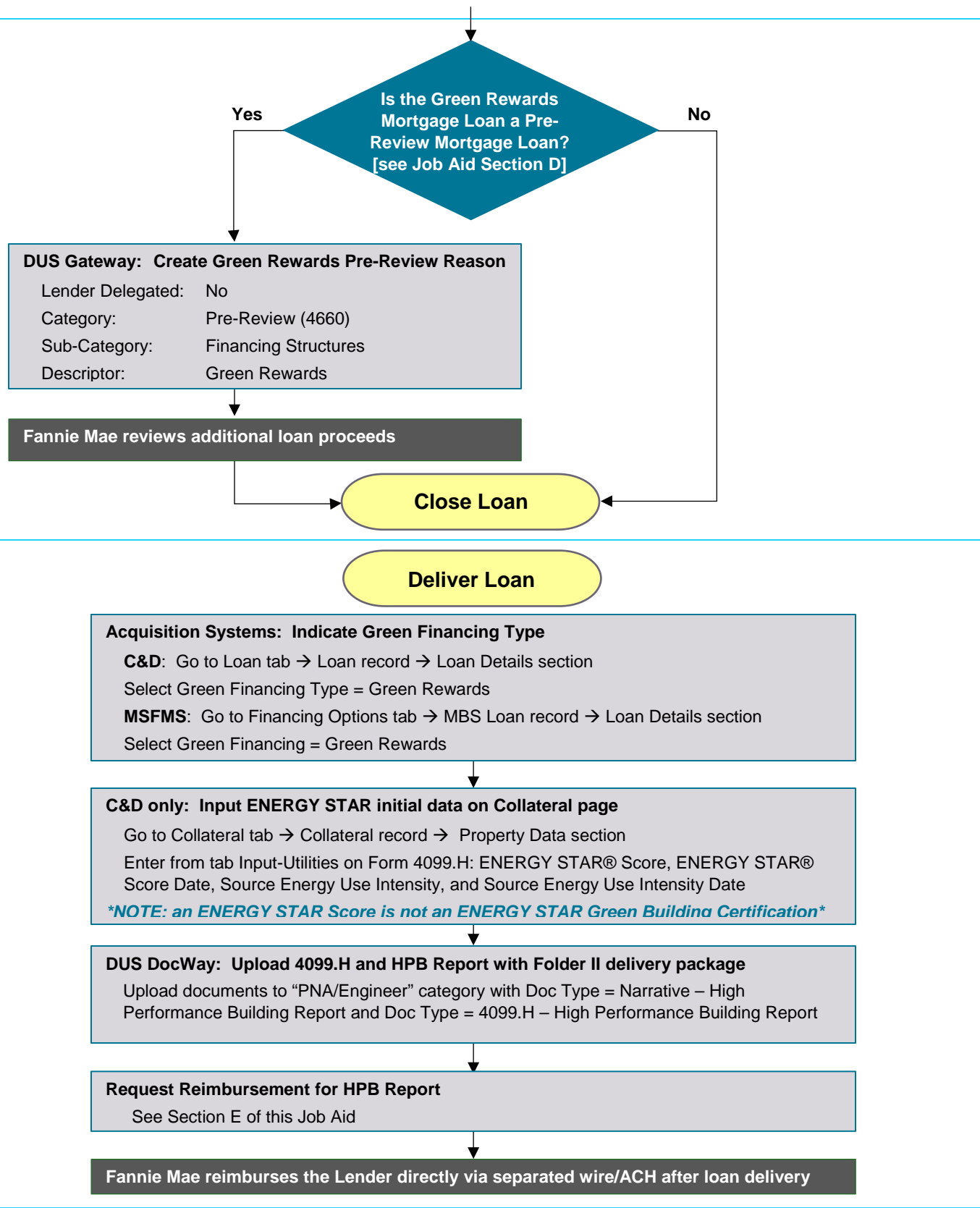


## G. Green Rewards Mortgage Loans: How to register, quote, close and deliver



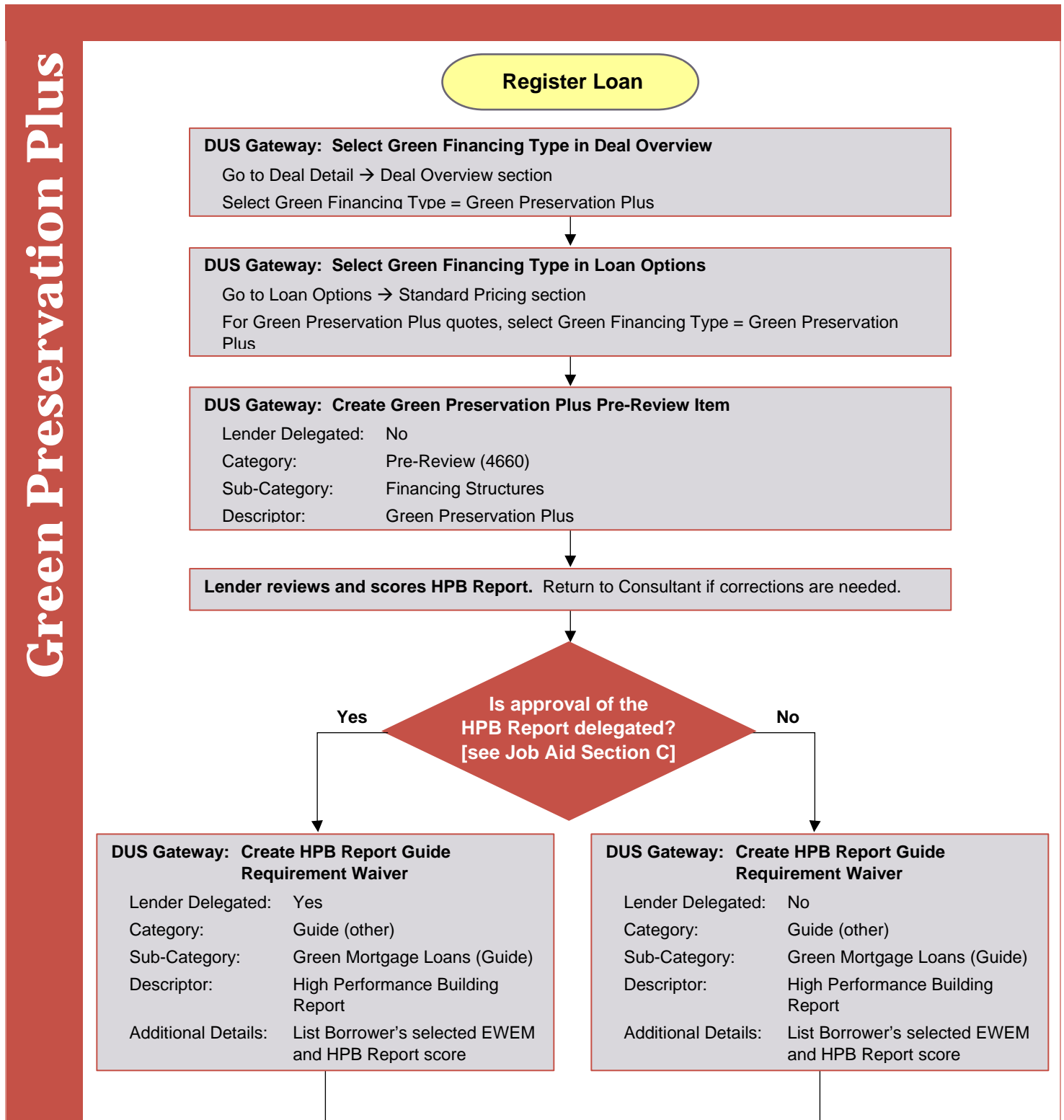


# Green Rewards (continued)





## H. Green Preservation Plus Mortgage Loans: How to register, quote, close, and deliver





# Green Preservation Plus (continued)

**DUS Gateway: Upload HPB Report and 4099.H to Deal Documents**

Document Category: Third Party Reports  
Document Type: High Performance Building Report

**Fannie Mae reviews and approves HPB Report**

**Close Loan**

**Deliver Loan**

**Acquisition Systems: Indicate Green Financing Type**

**C&D:** Go to Loan tab → Loan record → Loan Details section  
Select Green Financing Type = Green Preservation Plus

**MSFMS:** Go to Financing Options tab → MBS Loan record → Loan Details section  
Select Green Financing = Green Preservation Plus

**C&D only: Input ENERGY STAR initial data on Collateral page**

Go to Collateral tab → Collateral record → Property Data section  
Enter the following fields from tab Input-Utilities on Form 4099.H: ENERGY STAR® Score, ENERGY STAR® Score Date, Source Energy Use Intensity, and Source Energy Use Intensity Date

*\*NOTE: an ENERGY STAR Score is not an ENERGY STAR Green Building Certification\**

**DUS DocWay: Upload 4099.H and HPB Report with Folder II delivery package**

Upload documents to "PNA/Engineer" category with Doc Type = Narrative – High Performance Building Report and Doc Type = 4099.H – High Performance Building Report

**Request Reimbursement for HPB Report**

See Section E of this Job Aid

**Fannie Mae reimburses the Lender directly via separated wire/ACH after loan delivery**