



Fannie Mae®

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# Multifamily Selling and Servicing Guide

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## 403.01C HPB Module, HPB Report, and Technical Solar Report Approval

### Requirements

You must submit an HPB Report or HPB Module to Fannie Mae for approval if:

- you have delivered less than 8 Mortgage Loans that included an HPB Report (or a PCA Report containing an HPB Module); or
- your HPB Consultant has not been designated as “Pre-Qualified” by Fannie Mae at <https://multifamily.fanniemae.com/financing-options/specialty-financing/green-financing>.

Before Rate Lock, you must submit any Technical Solar Report to Fannie Mae for approval.

### Operating Procedures

If Fannie Mae’s approval of an HPB Module, HPB Report, or Technical Solar Report is required, you must:

- Submit in DUS Gateway, per the [Green Mortgage Loan Job Aid](#), the
  - HPB Module or HPB Report and [Form 4099.H](#), or
  - Technical Solar Report and [Form 4099.I](#).
- Follow this submission timing:
  - For the HPB Module or HPB Report,
    - at least 5 days before Rate Lock, if not using the Streamlined Rate Lock option, or
    - at least 10 days before the Mortgage Loan Origination Date, if using the Streamlined Rate Lock option.
  - For the Technical Solar Report, at least 10 days before Rate Lock.



## Glossary

### D

**DUS Gateway** Multifamily pre-acquisition system, or any successor systems, recording deal registration, Pre-Review and/or waiver tracking, Mortgage Loan Commitments, and decision records.

### G

**Green Mortgage Loan** Mortgage Loan secured by a Property that incorporates features expected to have a positive environmental outcome including, but not limited to, reducing energy and water consumption at a Property, generating energy, or meeting criteria set by a third-party green building certification organization.

#### **Synonyms**

- Green Mortgage Loans

### H

**HPB** High Performance Building

### M

**Mortgage Loan Origination Date** Date you fund a Mortgage Loan to the Borrower.

#### **Synonyms**

- Mortgage Loan's Origination Date
- Origination Date

### P

**PCA Report** Property Condition Assessment Report documenting the findings of a PCA.

### R



## Rate Lock

Agreement between you and the Investor containing the terms of the Lender-Arranged Sale or Multifamily Trading Desk trade of the Mortgage Loan and the MBS terms and conditions relating to the underlying MBS, if applicable, which may be documented via a recorded telephone conversation.

### **Synonyms**

- Rate Locks