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Notification 20-13: Form 4099

Effective: 09/30/20
Retired: 07/30/21

Summary of Changes

HIGHLIGHTS
Effective for Green Rewards Mortgage Loans Committed on or after September 30, 2020, certain Form 4099 documents were updated: • Form 4099: Instructions for Performing a Multifamily Property Condition Assessment (PCA Module: High Performance Building Assessment); and • Appendix I: Technical Solar Assessment (Form 4099.I).

Primary Changes

- Form 4099: Clarified instructions for High Performance Building Consultants for entering trailing 12-month (baseline) utility data in ENERGY STAR Portfolio Manager.
- Form 4099.I: Enhanced usability for the Technical Solar Consultant.

This version of Form 4099 includes the changes published in Guide Update 20-08: Data Standardization which is also effective on September 30, 2020.

Questions

Please contact Molly Simpson at (617) 345-8042, or green_financing@fanniemae.com, with any questions.

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