Fannie Mae

Lender Job Aid: Measurement Setup After Loan Closing

This Lender Job Aid provides information for you to share with your Borrower about the Measurement Setup process required for all Green Mortgage Loans. Fannie Mae has contracted Bright Power, a national firm providing energy and water services for multifamily buildings, to assist Borrowers in collecting and reporting utility data to meet the annual Energy Performance Metrics (whole property energy and water data) reporting requirement for their Green Mortgage Loan. Below you will find a step-by-step outline of what your Borrower should expect and resources to set them up for success.

Step 1: Borrower contacts Bright Power

Within 60 days of Mortgage Loan Origination Date, the Borrower must contact Bright Power via email at fanniemaegreen@brightpower.com to begin Measurement Setup. The Borrower should include the complete Property name and address in their email, as well as the email and phone number of the appropriate contact to assist with the Measurement Setup process.

Step 2: Bright Power sends the Measurement Property Setup Form to the Borrower

This is an online form customized for each Green Mortgage Loan. The form collects crucial information about the Property.

Step 3: Borrower completes the Measurement Property Setup Form

The form includes questions about basic Property details like square footage, utility metering, and payment information. *We have included a resource, the Step-by-Step Measurement Setup Guide and Worksheet for Borrowers to assist your Borrower in the preparation of necessary Property information in advance of beginning Measurement Setup.*

Step 4: Borrower provides access to owner-paid utility usage and cost data

After completing the Measurement Property Setup Form, Bright Power will send your Borrower the Credential Capture Form, a secure online form to submit their login credentials for all utilities at the Property. This method of access is the easiest and least time consuming for Property staff. The authorization does not allow Bright Power access to tenant information. The Credential Capture Form will provide access only to owner-paid utility data.

If the Borrower is unable to provide login credentials, they must complete the Measurement Data Form, an online form where Borrowers confirm they will not be providing such access. The document requires an alternate method of utility data sharing such as bill scans or spreadsheets that will be provided to Bright Power each reporting year.

If the Borrower works with a third-party utility service (bill pay) provider to manage their utility bills, Bright Power can work with them directly to access the necessary utility data.

Step 5: Bright Power informs the Borrower when they have completed Measurement Setup

Once the Borrower has provided all Property information and utility data access, Bright Power will email the Borrower to confirm the Measurement Setup process is complete.

Step 6: Bright Power engages with the Borrower annually to complete the Energy Performance Metrics reporting requirement

The Borrower will need to provide access to both owner-paid and tenant-paid utility data each year to comply with their Green Mortgage Loan reporting requirement.

When the login credentials shared by the Borrower contain the full year of utility usage and cost data, no further action is needed for owner-paid data. If the Borrower does not provide login credentials, Bright Power will request an alternate data source.

When tenants pay utilities directly for energy and/or water at the Property, Bright Power will collect whole Property (aka “aggregate”) data, collect tenant release forms for a sample of apartments, or use other data sharing methods depending on the utility company.

Lender and Servicer Involvement

Lenders and Servicers are responsible for communicating the Measurement Setup and annual reporting requirement to the Borrower and ensuring they contact Bright Power within 60 days of the Mortgage Loan Origination Date. Servicers are also responsible for ensuring Borrowers comply with annual reporting requirements for the life of the Loan.

If the Borrower is unresponsive or otherwise fails to provide the requested information, Bright Power will notify the Servicer and request that they contact the Borrower. Email templates are available to assist in this communication.

Resources to share with Borrowers

1. Step-by-Step Measurement Setup Guide and Worksheet for Borrowers
2. Borrower Guide for Measurement
3. Borrower Green Rewards Mortgage Loan Guide (see Step 4 – Measurement)
4. Green Building Certification Mortgage Loan Guide (see Step 4 – Measurement)
5. Resident Utility Data Collection Overview
6. Green Rewards: Measurement and Verification Timeline for Borrowers
7. Green Building Certification: Measurement Timeline for Borrowers
8. You have a Green Loan – Now What?
9. Email template to send to the Borrower introducing Measurement Setup

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