

Frequently Asked Questions

Lender Questionnaire Template Updates

A reference for common questions about the upcoming template updates. For anything not covered here, contact support@homewisedocs.com.

The basics

Q: Are Limited Review forms being removed from my HomeWiseDocs portal?

A: No. The Limited Review questionnaire stays in your portal. In some lending scenarios, lenders may still request it.

Q: Are we currently in compliance? We haven't made any template changes.

A: Yes. Our Forms team works behind the scenes to make sure every questionnaire order is completed with the necessary answers before it's processed. The template updates simply move that work upstream: with your team's approval, your associations are ready ahead of the next order instead of scrambling at the time of the request.

Q: Why are these changes happening now?

A: Two reasons. First, to stay aligned with Fannie Mae's updated project standards. Second, to incorporate improvements lenders have requested, so questionnaires capture the right detail up front and orders turn around faster with less back-and-forth.

Q: Is this a Fannie Mae requirement or a HomeWiseDocs decision?

A: Both. Some changes are driven by Fannie Mae's updated requirements; others are improvements HomeWiseDocs is making at the same time to reduce follow-up requests and speed up turnaround.

Timing

Q: When do these changes take effect?

A: The updated questions are available in your templates starting September 14, so you can begin completing them anytime. Required fields go live October 14.

Q: What happens if I don't update my templates before October 14?

A: Nothing breaks. Starting October 14, if a lender questionnaire order comes in with required questions left blank, those questions must be completed before the order can be released for processing. Updating ahead of time simply avoids that pause.

Q: Is there a hard deadline to update all of my associations?

A: No. There's no requirement to bulk-update everything by a certain date. The only trigger is an incoming order after October 14 with blank required fields.

What is changing

Q: What's actually changing on the templates?

A: A set of new, reworded, and newly required questions across eight sections of the questionnaire. Most are new; some are existing questions reworded for clarity or now

required where they were previously optional. The full list is available in the impacted-questions reference.

Q: Do all of these questions apply to every association?

A: No. A small number apply only to associations in California or Florida, and those are clearly flagged so you can skip anything that doesn't apply to your communities.

Q: Which templates are affected?

A: The updates apply to lender questionnaire templates across all association types.

What to do

Q: What do I need to do to prepare?

A: You have two options.

- **Update proactively.** Updating your association templates ahead of time ensures your next lender questionnaire order processes seamlessly. For companies managing hundreds or thousands of associations, we understand that may not be a feasible project.
- **Update as orders come in.** Handle template updates as lender questionnaire orders are placed. HomeWiseDocs will automatically flag the order for your team to review; once the questions are answered, the order is released for processing. This puts the work at the point of need, but it does add time pressure since there's a pending order waiting.

Q: How will I know which questions need answering?

A: After October 14, HomeWiseDocs automatically flags any order with incomplete required questions so your team knows exactly what to complete before it's released.

Q: Will these changes delay my orders?

A: Only if a required question is blank when an order comes in. Answering the new required questions ahead of time, or as soon as an order is flagged, keeps things moving.

Q: Will my existing answers still be there, or do I have to re-enter everything?

A: Existing answers remain in place. Only the new and newly required questions need your attention.

[Please confirm this matches system behavior before publishing.]

Cost and support

Q: Is there a fee for these updates?

A: No. There is no fee from HomeWiseDocs for these template updates.

Q: Who do I contact if I have questions?

A: Email support@homewisedocs.com and our team will help.