



**WELL at scale Review  
Pre-Submission Information Form**

***\*\*We recommend submitting this form two weeks before your planned review submission.  
Your review will not start until we have clarified any outstanding questions needed  
based on the information provided in this form.***

We're excited to get your WELL review underway. Please complete this form and send it to your WELL coaching contact via the Support tab in your WELL account. For more guidance on ensuring you have completed all information correctly, please see [this knowledge base article](#). Thank you!

**Select Review Cycle Round:**

- Round 1 - please complete and submit this entire form.
- Round 2 - if no changes to any location information or targeted milestones, please submit your round 1 form with this box checked.
- Round 2 - if there are changes to location information or targeted milestones, please complete and submit an updated form.

**Step 1: Please confirm and check each box to indicate that you have completed the following steps.**

- Download the Locations spreadsheet from the locations tab of your online account and confirm that the following information is correct and up to date. If you have made corrections on the spreadsheet, upload the updated spreadsheet back into your WELL account. For guidance on uploading an updated location spreadsheet, scroll down to the section 'Edit multiple fields across multiple locations' in [this knowledge base article](#).
  - Ownership Type is correct in column J.
  - Targeted certifications and ratings for this review round only are correctly identified in columns N-S. (For guidance on designating milestones for single or multiple locations, please see [this knowledge base article](#).)
  - Construction Status in column U is correct (any locations under construction will show as 0 occupants, cannot achieve any location achievements other than Precertification, and will not contribute to an Enterprise subscriber's WELL Score.)
  - Estimated occupancy is correct in column Y.

- For Enterprise subscriptions: Legal entity in column Z is correct, so that WELL Score(s) can be calculated correctly. (For guidance on assigning legal entity names to locations, see the WELL knowledge base article [here](#).)
- Minimum of five locations are listed for your WELL at scale account.

**Step 2: Please confirm and check each box to indicate that you have completed the following steps.**

(Note that once the review process begins, any incomplete or incorrect information will need to be corrected in the next review round.)

- All documents to be reviewed:
  - Have been uploaded and assigned to the relevant locations, feature parts and verification methods.
  - Are entirely in English, or all information needed to confirm feature compliance is in English.
- If submitting documentation for Core properties:

We have reviewed the [WELL Core guidance](#).
- Reviewing open tasks:
  - We have [checked the "Tasks"](#) list in the Document Library to confirm there are no open tasks for documents/feature parts that should be reviewed in this cycle.
- For all Letters of Assurance being submitted:
  - We used the WELL templates, without making any changes to those templates, and confirmed that all were signed by the responsible party.
- **Performance testing data:**
  - I am not submitting any performance testing data in this review round.
  - I am submitting performance testing data and I have confirmed:
    - Performance testing data and files have been uploaded and tagged to relevant features and locations, per instructions [here](#).
    - All supplemental documents have been uploaded by the Performance Testing Organization to the relevant features: equipment calibration certificates, field

photos of equipment setup, raw performance test data, and a completed Performance Testing Submittal sheet.

- **If pursuing Ratings in this review cycle (if not pursuing a Rating, please skip this section):**
  - Documents for any new Rating pursuits have been uploaded and assigned in the relevant Ratings tab scorecard in the digital account.
  - If relevant, any ongoing documentation for Rating renewals have been uploaded and assigned in the relevant Ratings tab scorecard in the digital account.
- **If pursuing WELL Health-Safety Rating AND your account is not labeled as “HSR ENHANCED” on your account login page:**
  - We are uploading the completed [Multiple Projects Documentation Sharing Form](#) via the WELL Account Support tab, along with this completed Pre-submission Information Form.
- **Please use the following section to communicate any information the reviewers would need to know to complete your review. For example: any locations that are already undergoing a separate WELL review; locations that are shared by multiple legal entities (for Enterprise subscribers receiving a WELL Score); nuances or unique circumstances about your projects that would be helpful for your coaching contact and review team to know.**

Your name:

Title:

Organization:

Email:

Date:

Does the WELL at scale administrator and/or owner work for a WELL Enterprise Provider organization?

- Yes [Provide organization name, if different than the organization listed above:
  
- No

**Your Next Steps:**

- 1. Please indicate dates and times that you are available for a 30-minute touch base call with your coaching contact before submitting for review.**

Date / Time 1:

Date / Time 2:

Date / Time 3:

Date / Time 4:

- 2. If pursuing a WELL Rating (including a renewal) in this review cycle, please complete the following page for award fulfillment information.**
- 3. Tell us how we are doing! Your feedback helps us improve our program and support model.**
  - a. On a scale of 1 to 10, with 10 being the best, how would you rank your experience with and level of support from the WELL coaching support team?**
  
  - b. Please provide any comments or suggestions based on your experience with the WELL coaching support team.**

- c. On a scale from 1 - 5, with 1 being challenging and 5 being smooth, how would you rate your last WELL review cycle process (a WELL review cycle consists of a round 1 and round 2 review)? If you haven't been through a review cycle, indicate N/A.
- d. What worked well in preparing for and navigating through your last WELL review? For example, were you able to leverage shareable documents, was the Excel progress report helpful in organizing information and next steps, were there any resources that were particularly helpful, etc.
- e. What was challenging or could be improved from your WELL review experience? I.e., were there any parts of the process that took more time than you were expecting or that you found confusing?
4. Please upload this form to your coaching contact via the Support tab in your WELL account. Thank you!

#### Rating Award Fulfillment Information

(Only complete if pursuing a WELL Rating in this review cycle)

Upon Rating achievement, we will send you a complimentary seal package that includes four seals per location up to a total of 1,600 seals. Additional seals are available for purchase. *Please note that the cost of shipping is NOT included. Cost is \$9.95 for domestic and \$24.95 for international shipping. International customs fees may apply.*

**Number of locations pursuing the Rating in this cycle:**

**Seal Color** (check one per Rating pursued):

- WELL Health-Safety Rating - Blue
- WELL Health-Safety Rating - Transparent
- WELL Equity Rating - Green
- WELL Equity Rating – Transparent
- WELL Performance Rating - Blue

- WELL Performance Rating - Transparent

**Preferred language for seals:**

- English
- French (Only available to projects located in French speaking countries)
- Bilingual - English and Simplified Chinese
- Bilingual - English and Traditional Chinese

**Additional Seals:**

If you are requesting more seals than those provided (4 per location), please include the number of seals you request in addition to your complimentary package. Price is \$10 for a package of four, plus shipping and handling (Please provide a total number, not a count per location.).

- We are requesting additional seals. Total number of seals requested:

**Shipping information** - Please list where to ship your seal package. All seals are sent in a single shipment to a single location unless otherwise requested. ***To request to have seals shipped to multiple locations, please fill in the Primary contact information below, then skip to the multiple locations directions.***

**Primary contact:**

Name (first, last)

Email:

Phone: \*

*\*Required for international orders*

**Shipping Contact:**

Name (first, last)

Company:

Street Address:

Address 2 (Suite # etc.)

City:

State/Region:

Country/Region:

Postal Code:

Email:

Phone:

**Shipping to multiple locations** - IWBI will gladly ship seals to multiple locations, however, ***please note that clients are responsible for all shipping fees and international duty / customs fees.***

Download and complete the [bulk shipping form](#) from the Knowledge Base, following the directions listed on the form. Upload the completed form to your coaching contact via the Support tab in your WELL account. We will provide an estimated shipping fee and invoice to you. Once the shipping fee is paid we will then ship out your orders.