

WELL Enterprise Provider Pre-Approved Template for WELL Documentation FAQs

What is a Pre-Approved Template?

As WELL adoption continues to grow globally and implementation is executed across tens of thousands of projects, there are certain situations where WELL feature compliance (and associated documentation) across multiple locations and even across multiple clients/owners is generally consistent. To help support streamlining and improve confidence of WELL review outcomes in such situations, IWBI is piloting the use of a Pre-Approved Template with WELL Enterprise Providers (WELL EPs).

A Pre-Approved Template is documentation that has been reviewed and approved for compliance with a specific WELL feature part. It includes standardized language that does not need to be re-reviewed when it is applied to locations in future WELL reviews, regardless of the client/owner. The goal with Pre-Approved templates is to provide feature compliance details/information that go beyond what is already included in WELL feature language. For example, a policy Pre Approved Template should reflect actual policies, not generic policy templates just restating feature language.

During this pilot phase, the Pre-Approved Templates are a benefit to WELL EPs who can apply them towards feature parts that contribute to any WELL v2 achievement, including WELL Certification, WELL Ratings and a WELL Score. They are meant to be used as-is or with minimal customizations to clarify location- and/or organization-specific details.

What are the benefits of a Pre-Approved Template?

Using Pre-Approved Templates provides an added layer of assurance to WELL EPs that this documentation will be approved each time it is submitted as part of a location- and/or organization-specific WELL review, provided that any customizations meet the feature part requirements and associated verification method. Specifically, if no project-specific customization is needed, a Pre-Approved Template will not be re-reviewed when submitted as part of a location- and/or organization-specific WELL review; it will automatically be deemed an approved form of documentation. If the Pre-Approved Template includes customized language, only the customized portion will be reviewed when submitted as part of a location- and/or organization-specific WELL review.

What are examples of where a Pre-Approved Template could be used?

As illustrated in the below examples, a WELL EP may utilize a Pre-Approved Template to gain assurance that standardized documentation can be applied across multiple locations/clients in different WELL reviews without raising new or unexpected review comments. (NOTE, this list is meant to be illustrative, and not exhaustive of possible scenarios.)

WELL Enterprise Provider

Pre-Approved Template for WELL

Documentation FAQs

- The WELL EP is providing WELL-compliant services in the same way across multiple locations or clients, such as through the administration of facility management protocols.
- The WELL EP is assisting a client that is pursuing WELL Certification and/or WELL Ratings across multiple locations on different timelines, but many features are being met through a standardized policy that would cause redundancy if reviewed in each separate review.
- The WELL EP is deploying an identical or similar strategy to achieve a WELL feature across multiple locations or clients, such as for stakeholder engagement, education materials, and/or professional narratives.

How are Pre-Approved Templates created, submitted and reviewed?

When a WELL EP has identified feature parts where compliance and the verification methods can be consistently applied across multiple locations/owners, the WELL EP will create a template document that addresses the feature part requirements and satisfies the related verification method. The templated documentation must:

- Specify the relevant WELL feature part number (using WELL v2 and/or WELL Rating feature coding) and associated verification method.
- Include specific language and be written in a format that meets the feature part requirements and associated verification method (e.g., policy, operations schedule, technical document, professional narrative).
- Clearly indicate, through a **yellow highlighting function**, any section(s) that will be populated with location- and/or organization-specific information when submitted for project-specific WELL reviews in the future.

Templated documents are not necessarily associated with any one WELL enrollment and thus should be submitted to WELL Reviewers outside of a project-specific WELL review cycle. Submissions should be sent via email to wellep@wellcertified.com and will be returned within 15 business days. If the WELL Reviewer has a question or concern on any aspect of a templated document that has been submitted for review, a Mid Review Clarification ([MRC](#)) may be sent to the WELL EP. The review timeline will be paused while the WELL Reviewer awaits a response to the MRC from the WELL EP.

Upon approval, the templated document will be referred to as a Pre-Approved Template that has been assigned a unique identification number for tracking. The WELL EP will also receive a Pre-Approved Template Confirmation form which must be completed by the WELL EP when utilizing the Pre-Approved Template on a location- and/or organization-specific WELL review. This Confirmation form asks the WELL EP to confirm that the templated language has been applied to a specific location and/or organization.

WELL Enterprise Provider Pre-Approved Template for WELL Documentation FAQs

When submitting a Pre-Approved Template as part of a location- and/or organization-specific WELL review, the WELL EP should reference the unique identification number on the Pre-Approved Template and submit it alongside the completed Confirmation form.

If a templated document is not approved during the first review round, can I make adjustments and submit it again?

Yes. If a templated document is not approved as a Pre-Approved Template following the first review, WELL EPs have the opportunity to make modifications and resubmit. All additional rounds of review are subject to a 15 business day timeline.

How is a Pre-Approved Template used during a location- and/or organization-specific WELL review submission?

To use one or more Pre-Approved Templates during a location- and/or organization-specific WELL review submission, the WELL EP should take the following steps:

- Ensure that their WELL EP membership is active (ie, not expired) and that a staff member from the WELL EP is listed in the WELL digital account as a Project team member (or for WELL at scale, as a team member at that level).
- Add the unique identification number to the top of the Pre-Approved Template (this is provided when the templated documentation is approved by the WELL Reviewers).
- Ensure that the only sections of the Pre-Approved Template that have been edited are those that were highlighted to be customized with location- and/or organization-specific information.
- Confirm that, once any relevant location- and/or organization-specific customizations are made, the Pre-Approved Template still meets the WELL feature part requirements and associated verification method.
- Complete the Pre-Approved Template Confirmation form, validating that the Pre-Approved Template has been successfully implemented within the relevant location(s) undergoing a WELL review. Only one Confirmation form is required per WELL review, regardless of how many Pre-Approved Templates are being utilized.
- Upload the Pre-Approved Template in the WELL digital account using the normal documentation process based on the WELL achievement being pursued.
- Submit the Confirmation form via the project's Support tab.

WELL Enterprise Provider Pre-Approved Template for WELL Documentation FAQs

Who can submit and use a Pre-Approved Template?

Anyone that is directly employed by a WELL EP may submit a templated document for pre-approval. Similarly, anyone directly employed by a WELL EP can submit a Pre-Approved Template as part of a location- and/or organization-specific WELL review.

How much does it cost to submit a templated document for approval as a Pre-Approved Template?

WELL EPs can propose up to five Pre-Approved Templates per subscription year as a complimentary benefit (ie, for five feature parts/strategies). This includes 2 rounds of review, with additional review rounds subject to fees.

Beyond that amount, EPs may propose additional templates for \$500 per review cycle (per feature part), which aligns with AAP/EP review fees. Any additional review rounds are subject to additional fees.

Can Pre-Approved Templates be used on any WELL review submission?

Pre-Approved Templates can be used by WELL EPs to document any feature parts within WELL v2, which includes documentation for locations pursuing WELL Certification as well as the WELL Health-Safety Rating, WELL Equity Rating, and the WELL Performance Rating. They may also be used to document individual WELL v2 features within an enterprise or portfolio subscription. A location enrolled under WELL version 2 pilot, the [WELL Skybridge](#) tool may be used to upgrade individual feature parts to WELL v2. Once the feature part has been upgraded, the WELL EP can utilize the applicable Pre-Approved Template.

Note that for use on a WELL review submission the WELL EP membership must be active (ie, not expired) and that a staff member from the WELL EP must be listed in the WELL digital account as a Project team member (or for WELL at scale, as a team member at that level).

When can I submit my templated document for review as a Pre-Approved Template?

Templated documents are not necessarily associated with any one WELL enrollment and thus must be submitted to WELL Reviewers outside of a project-specific WELL review cycle. Templated documents can be submitted by a WELL EP for review at any time prior to use on a location- and/or organization-specific WELL review.

WELL Enterprise Provider Pre-Approved Template for WELL Documentation FAQs

EPs can submit up to 5 complimentary Pre-Approved Templates per subscription year, which each include up to two rounds of review. Additional PATs can be submitted for a fee of \$500 each per review cycle (per feature part), which aligns with AAP/EP review fees. Any additional review rounds are subject to additional fees.

The templated document must be approved for use as a Pre-Approved Template before the Pre-Approved Template can be utilized on a location- and/or organization-specific WELL review.

For which feature parts and verification methods can Pre-Approved Templates be used?

Pre-Approved Templates **can** be used for any WELL feature part that corresponds with the following verification methods: Operations Schedule and/or Policy Document, Professional Narrative, Technical Document, Beta Feature Feedback Form or Innovation Form. Pre-Approved Templates **cannot** be used for WELL feature parts that correspond to the following verification methods: Letters of Assurance, Performance test, Sensor Data, Photographs, or On-going data or maintenance reports.

Please keep in mind that the goal with Pre-Approved templates is to provide feature compliance details/information that go beyond what is already included in WELL feature language. For example, a policy Pre Approved Template should reflect actual policies, not generic policy templates just restating feature language.

Does a Pre-Approved Template expire?

Pre-Approved Templates expire three years from the date of approval. Expired Pre-Approved Templates can be re-submitted following the original process. Upon approval, it will be assigned a new unique identification number. If the standardized language in a Pre-Approved Template needs to be revised prior to its expiration, it will need to be re-submitted and reviewed as new. Upon approval, it will be assigned a new unique identification number.

Can a Pre-approved Template be used for projects that are using different addenda versions?

Yes, Pre-Approved Templates are valid across different WELL addenda versions.

Can I, as an Enterprise Provider, submit a Pre-approved Template on behalf of my client?

WELL Enterprise Provider Pre-Approved Template for WELL Documentation FAQs

Yes, an EP that is actually implementing the Policy/Operations schedule on behalf of the client (for example - a Property service manager that is implementing the Cleaning policy/program) could also get their own policy approved.

Can I, as an Enterprise Provider, submit a Pre-approved Template for a policy that is applicable at multiple locations?

Yes, an EP that is working on multiple locations for the same client could get that client's Policy approved once as a PAT.