

A PRACTICAL GUIDE AND PRINTABLE WORKSHEET

Home document conversation guide

Use the documents around a home to prepare a more specific question, reach the appropriate person and keep a clear record of the next step. For builder teams, homebuyers and the professionals supporting them.

Start with the buyer's plans

What does the buyer want to understand or do? A fence, future addition, rental plan or shared-maintenance question can point to different records. Write down the intended use before trying to interpret the paperwork.

Gather what the question depends on

- ☐ The current agreement and relevant addenda, with document dates or versions.
- ☐ The relevant title, HOA, permit, survey or recorded-property material, as available.
- ☐ The specific page, section, record number or source link behind the question.
- ☐ Any response already received and any deadline stated in the actual documents.

Keep three things separate

- **What the record says.** Identify the document and relevant passage.
- **What it does not establish.** Name the missing information or conflict.
- **What happens next.** Assign a question to an appropriate contact; record the answer when it arrives.

This guide is an educational preparation tool. It is not a property inspection, a complete document inventory, legal advice, a warranty decision or confirmation that a home is ready to close. Requirements vary by place and transaction.

BEFORE CLOSING

Questions behind the records

Select the prompts relevant to this home. Ask for the underlying source when a summary or reference leaves the important point unclear.

Title and recorded interests

- Which exceptions or recorded agreements relate to the buyer's intended use? Can we see the actual instrument?
- Where is an easement shown on the available survey or plat, and who can explain its effect on access or a planned improvement?
- What does the proposed title policy cover, and which exceptions or exclusions remain? Ask the title professional; seek legal advice when needed.

HOA and community documents

- Which declaration, amendments and current rules apply to this home?
- What dues or approved assessments should the buyer understand? Who maintains and insures shared areas?
- Is approval needed for the buyer's proposed use or change? Which public requirements should also be checked?

Permits and local requirements

- Does the record match this address or parcel and the work being discussed? What is the current inspection or permit status?
- Which local department can explain an incomplete record or supply documents that are not online?
- What final approval or occupancy record applies locally, and are conditions still outstanding?

A title policy, association approval and building-department record answer different questions. Do not treat one as confirmation of all the others. A missing online record calls for a follow-up question, not a legal conclusion.

Background: CFPB on owner's title insurance; Texas Department of Insurance on title questions; California DRE on common-interest communities; City of Austin on inspections. State and city sources are examples only. Links and scope are on page 5.

NEW-HOME HANDOVER

Carry the context into customer care

Use the handover conversation to establish what is recorded, what remains open and whom to contact next. The builder and homeowner should be able to refer back to the same written information.

At the handover

- ☐ Identify the current Warranty Booklet, relevant manuals and manufacturer information.
- ☐ Record each open item by location, observation and date; add an appropriate photo or document reference.
- ☐ Record the response, next action, responsible contact and any timing actually agreed.
- ☐ Confirm how the buyer will receive an update when an item's status changes.

Ask about the service process

- Where should written service requests go, and which instructions apply?
- What document states the relevant coverage period, its start date and any notice requirements?
- What exclusions or maintenance responsibilities should the homeowner review?
- Who handles product or manufacturer questions? Is there a separate urgent-service route?

Preserve the written record

Save requests, replies and supporting documents together. Distinguish an observation from an agreed action and a reported repair from a confirmed completion. The worksheet on page 4 can help.

Warranty terms differ. A builder warranty, a manufacturer warranty and a purchased service contract are not interchangeable. Follow the actual written process and ask the named contact to explain unclear requirements. This guide does not decide whether a particular item is covered.

Background: FTC, Warranties for New Homes. Local completion records should be confirmed with the relevant building department. Links and scope are on page 5.

PRINT OR KEEP WITH THE FILE

Your document conversation record

Use one sheet per question. Add the response and supporting source when received. Keep personal or confidential material in an appropriate private file.

Home or project reference

Document name, date or version, and page or section

What the available record says

The question or point still needing confirmation

Person or organization to ask and date asked

Any stated deadline and the document or person that supplied it

Response received and supporting source

Next action, responsible contact and agreed timing

Status

Question prepared / Sent / Response received / Further review needed / Action completed

Mark only what has happened. A response or acknowledgment does not, by itself, establish compliance, coverage or resolution.

FOR YOUR NEXT CONVERSATION

Prepare for a walkthrough

Bring a description of your team's workflow and one question you want to answer better. Useful examples include finding a source during a buyer conversation or carrying an open item from sales into customer care.

A live transaction upload is not needed to start. Do not send confidential documents through the website inquiry form. Discuss a suitable sharing route with the CloseReady team first.

Request a walkthrough at becloseready.com/walkthrough

A request is an inquiry, not a reserved meeting time. Builder-specific capabilities are being developed with design partners; the conversation should distinguish current capabilities from proposed workflows.

Sources and scope

FTC: Warranties for New Homes

U.S. consumer education; actual warranty terms vary.

CFPB: Questions about the closing process?

U.S. mortgage-closing education.

CFPB: What is owner's title insurance?

U.S. consumer education; policy-specific coverage must be confirmed.

California DRE: Common Interest Developments Require Special Care by Agents

California example. Disclosure duties and timing differ elsewhere.

Texas Department of Insurance: Title insurance FAQ

Texas example. Policy forms and coverage differ elsewhere.

City of Austin: Certificate of Occupancy

Austin example. Ask the local department which completion record applies.

City of Austin: Building Inspections

Austin example. Record availability and inspection processes vary by jurisdiction.

Public references checked October 7, 2026. The questions and worksheet are original educational material from CloseReady. State and local sources illustrate the issues to ask about; their specific legal requirements are not applied nationally.