



LISTING MANAGEMENT – ADD/EDIT

SUPPLEMENTAL INFORMATION and User Step-By-Step Instructions

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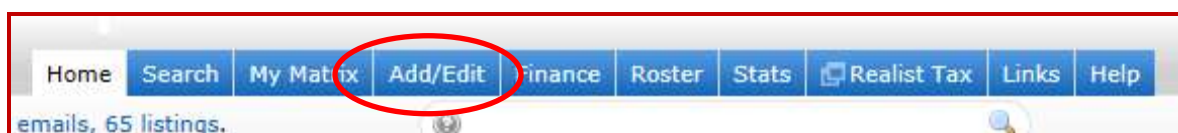
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MATRIX 'TO DO' LIST

A. Logging in to Matrix

- a. Go to <http://www.SRAR.com>
- b. Click the 'Login to Matrix' button.
- c. Enter your User Name and Password.
 - i. Example: User Name: F210099999 or SR210099999
Password: If you do not have a password you will be prompted to choose a new security question and answer.

B. Updating/Checking your Contact information



- a. Click the Add/Edit tab.
- b. Scroll to 'Roster/Quick Modify'. Enter your member ID and click 'Edit'.
- c. Update/Verify your Contact Information and Preferred Contact Order.
- d. Click 'Submit Agent' to save.

Go to Quick Modify field and enter your member number.

Click on the Edit function to begin update.

1

Roster

[Add new](#) or [Edit existing](#) Agent Roster

Quick Modify:

-- Roster ID -- [Edit](#)

Verify ALL information on the left side of screen. Double check Email address.

2

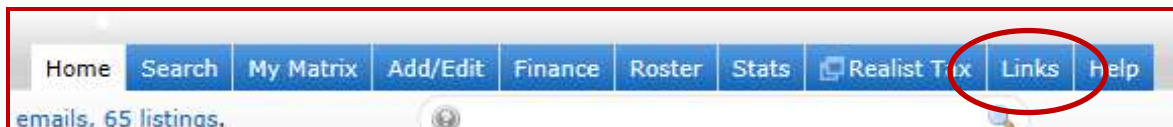
 A screenshot of the 'Change Contact Information' form. The form is divided into several sections:

- Contact Information:** Fields for Direct Office Phone, Home Phone, Toll Free Phone, and Mobile.
- Cell Phone:** Field for Cell Phone.
- Fax:** Field for Fax.
- Agent:** Field for Agent.
- Preferred Contact Order:** A section with a dropdown menu and a list of options: Agent Call Pk, Agent Home Pk, Agent Fax, Agent Voice Mail, Agent Paper Pk, and Agent Text Message.

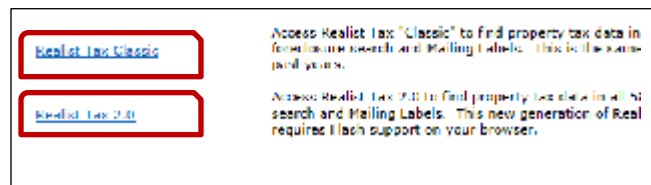
 At the bottom of the form, there are 'Cancel' and 'Submit Agent' buttons.

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Indicate your preferred order of contact by selecting from the drop down. Be sure any contact choice is supported by an entry on the left side.

ACCEPT 'REALIST TAX' END USER LICENSE AGREEMENT

1. Click the "Links" tab on your Matrix homepage.
2. Scroll down to Realist Tax Classic and click on link.
 - a. Accept End User Agreement
 - b. Close window NEXT
3. Scroll to Realist Tax 2.0 and click on link.
 - a. Accept End User Agreement
 - b. Close window.



NOTE: You must accept both Realist Tax programs if you will be using the Auto-fill function in Listing Management/Add Edit.

CRISNetMLS HELPLINE:

SRAR VAN NUYS 818 947 2202

EMAIL techsupport@SRAR.COM

SRAR SANTA CLARITA 661 295 7117

EMAIL techsupport@SRAR.COM

ADDING Email SIGNATURE, PHOTO, HEADER/FOOTER



1. Go to www.SRAR.com and Login to Matrix
2. Click My Matrix tab.
3. Scroll to Settings and click.
4. Click on My Information. Check and/or edit the information. To change auto filled information click on the "Override" button located to the right of the field and enter your new information.
5. Click on Header & Footer; scroll the views of Headers to choose from and by clicking on the small button located on the left side you can choose your header. Click "Preview" along the lower left, click on "No Photo" or "Use Custom Photo" along the upper left. Click "Save" when done. *(Note that the default choice in this section is "No header or footer". This is the FIRST choice on the top, if you want a header or footer you MUST select one of the Headers listed.)*
6. Click on Email Signature tab. Enter your NAR suggested email signature including CalBRE# and click "Save". (See Below for example).

What is a professional REALTOR® signature?

According to the National Association of REALTORS® the following elements comprise a professional signature:

Elements:

Complimentary Closing,
Your Name, Title
CalBRE number
Preferred Phone number
Preferred FAX number
Email address
Website (if you have one)

Example:

Sincerely,
Tracy Johnson, REALTOR®, e-PRO, GRI
CalBRE 1245678
818 999 9999
818 888 8888
Tracy@TracyJohnson.com
www.TracyJohnson.com

Company Name
Address City, State Zip
Company Phone
Company Fax

California Realty
123 Main Street, Encino CA 91316
818 777 7777
818 555 5555 FAX

Your Email Signature should automatically apply itself whenever you send out an email from your CRISnetMLS Matrix account.

IMPORTANT LOCKBOX INFORMATION

13.6 If a lockbox is present on a Residential, Mobile Home or Residential Income (1-4 units) property which is located in the state of California and is listed for sale or lease in the CARETS system, the lockbox must be a lockbox that is approved by CARETS.

Only lockboxes that provide for reasonable and timely access will be approved by CARETS and approval must be obtained before placing the lockbox/device on a property. Lists of approved devices will be published by CARETS. **Access will be scheduled within four (4) hours of initial contact if the lockbox/device requires the participating member to contact the listing broker/agent for access.** Failure to provide reasonable and timely access will subject the listing agent to discipline and potential fines.

In other words: IF A LOCKBOX IS PRESENT ON YOUR LISTED PROPERTY WHICH IS LOCATED ANYWHERE IN THE STATE OF CALIFORNIA AND IS LISTED FOR SALE OR LEASE IN THE CARETS SYSTEM, THE LOCKBOX MUST BE A LOCKBOX THAT IS APPROVED BY CARETS.

NOTE: This could be an electronic box, a combo box or the door with keypad.

A complete list of MLS Rules and Data Integrity Standards can be found by going to SRAR.com/mls and then click on the link for either MLS Rules or Data Integrity Standards and download. MLS Rules and Data Integrity Standards should be reviewed annually.

DISCIPLINARY TIERS

TIER ONE

- **First Violation: Warning Email**
- **Second Violation: Attend class in lieu of fine (if such class offered by AOR/MLS) or \$100.00 fine**
- **Third and Subsequent Violations - \$300.00 fine**

Examples of Tier One Violations:

- Details on listing – incorrect or incomplete information on listing loaded into Matrix
- Reporting of Sales – incorrect status such as not reporting “Pending” or “Back-up”
- Photos on the MLS – no photo or no photo of structure
- Misuse of Remarks – including names, phones numbers, URL’s in Public Remarks

TIER TWO

- **First Violation: Warning Email (ONLY if Violator has not previously received a Tier One Letter)**
- **Second Violation: \$250.00 fine**
- **Third and Subsequent Violations : \$500.00 fine**

Examples of Tier Two Violations:

- Exempted Listings – not submitting an “Exclude of Multiple” form signed by the Seller. A copy of signature page of the listing agreement will also be required
- Availability to Show or Inspect
- False or Misleading advertising or representations – true picture standard of conduct

TIER THREE

- **First Violation: \$1,000.00 fine**
- **Second and Subsequent Violations: \$2,500.00 fine**

Examples of Tier Three Violations:

- Confidentiality of MLS Information
 - Use of MLS Information
 - Clerical Users
- NOTE: All the above relate to sharing passwords.*
- Key use and service – sharing key with other agents or clients.

*To avoid assessments be sure the Association and your listing has the **correct email address; respond to emails from the Association; Fix it!** Tier One and Tier Two give you one (1) warning, only Tier Three has no warning.*

SAN FERNANDO AND SANTA CLARITA VALLEY NEIGHBORHOOD/AREA MAPS

Attention All Agents listing in the San Fernando and Santa Clarita Valley's

To avoid an assessment on your listings, please check the Neighborhood/Area map boundaries in the SFV and SCV before entering your listing to be absolutely sure which area your listing is in. The map area definitions are accessed via the Home Page of SRAR.com and are the ultimate authority of what an area is named, NOT the auto populate in Add/Edit or any other source.

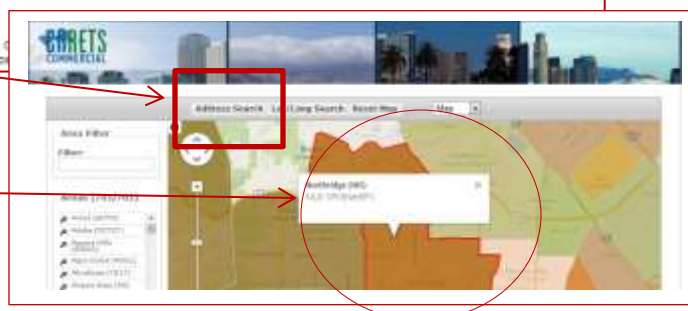
1. Go to SRAR.com and click on the MLS Tab
2. Click on to the "Neighborhoods/Areas/Tract Codes" link



3. Along the top of the screen you will notice a link that reads "**CARETS Market Area Viewer** Click to view and search the CARETS Market Areas".



4. Click on the Address Search function and enter the address (street number, name and zip code).
5. Click on "Search". Your property will be pinned and the CORRECT area will be identified. *Note: This function is what is used when there has been a violation issued to verify property area location.*



RANGE LISTINGS MADE EASY!

Frequently asked questions about Value Range Listings, Variable Range Marketing or Range Price Listings.

Q. First of all, WHAT is a Value Range Listing or Range Price Listing?

A. Value Range Listing, Variable Range Marketing and Range Price Listing comprise a simple pricing strategy to bridge the gap between the seller's high opinion of value and the "low-balling" buyer's frame of mind, thereby opening communication to allow market dynamics to dictate the price.

Q. Aren't your sellers just going to get offers at the bottom of the range?

A. For the most part, Yes. That's how the program is designed, and our sellers are prepared for it. The buyer knows that the seller will respond to any offer within the range, and is free to open negotiation anywhere within the range that they feel comfortable. What the seller gets is offers they normally would not have received, because some buyers would not have looked at the property at a fixed price.

Q. Why would a buyer make an offer above the bottom of the range?

A. For the same reasons that the buyer would not make a low offer on a fixed-price listing: the buyer wants to avoid embarrassing themselves or their agent, losing the house in a competitive or multiple-offer environment, or the risk of generating a high counter offer with a greater concession from the seller.

Q. Doesn't your seller have to take the offer that comes in? Isn't the seller saying they will take any offer within the range?

A. No. The seller says they will "entertain", or consider, all offers within the range. In other words, the seller promises to respond in writing to any offer within the range, with regard to whether they accept the offer or counter the offer, thus paving the way for further negotiations, and a possible transaction. However the seller is under no more obligations using Value Range Listing, Variable Range Marketing and Range Price Listing than they are with a fixed price listing.

7.4 Range Pricing

If a listing is specified as a Range Price Listing, the Listing Agent or Broker must enter a valid range for the list price of that listing. In all cases, the default List Price shall be the high end of the range and the low end of the range can be no less than 85% of this price, unless approved ranges have been filed with the California Department of Real Estate. In which case, the filed ranges shall be used in all Range Price listings.

SURVIVAL TIP

LEGAL DEFINITIONS FOR THE FIELD – SERVICE LEVEL- REFER TO MLS RULES 7.5.1 - 7.5.3

Full Service Listing

Full Service listings are listings whereby the listing broker pursuant to the listing agreement, will provide ALL of the services listed below:

Said Full Service listings will be identified with an appropriate code or symbol (e.g. 'FS') in MLS compilations so potential cooperating brokers will be aware of the extent of the services the listing broker will provide to the seller(s), and any potential for cooperating brokers being asked to provide some or all of the services to listing broker's clients, prior to initiating efforts to show or sell the property.

Limited Service Listing

Limited Service listings are listings whereby the listing broker, pursuant to the listing agreement, will not provide ONE OR MORE of the services listed below:

Said Limited Service listings will be identified with an appropriate code or symbol (e.g. 'LS') in MLS compilations so potential cooperating brokers will be aware of the extent of the services the listing broker will provide to the seller(s), and any potential for cooperating brokers being asked to provide some or all of these services to listing broker's clients, prior to initiating efforts to show or sell the property.

Multiple Listing Entry Only Listing

MLS Entry-Only listings are listings whereby the listing broker, pursuant to the listings agreement, will not provide ANY of the services listed below:

Said MLS Entry-Only listings will be identified with an appropriate code of symbol (e.g. 'ME') in MLS compilations so potential cooperating brokers will be aware of the extent of the services the listing broker will provide to the seller(s), and any potential for cooperating brokers being asked to provide some or all of these services to listing broker's clients, prior to initiating efforts to show or sell the property.

SERVICES

- A) Provide cooperating brokers with any additional information regarding the property not already displayed in the MLS.
- B) Accept and present to the seller(s) offers to purchase procured by cooperating brokers.
- C) Advise the seller(s) as to the merits of offers to purchase.
- D) Assist the seller(s) in developing communicating, or presenting counter-offers.
- E) Participate on the seller(s) behalf in negotiations leading to the sale of listed property.

The scope of service classifications set forth in these rules does not alter any obligations otherwise imposed on real estate licenses under California law, including Department of Real Estate regulations, statutory law and common law. The MLS's acceptance or publication of listings eligible for MLS submission in no way constitutes a validation that said obligations have been met.

BATHROOM FORMAT FOR LISTING MANAGEMENT (ADD/EDIT)

In an effort to make the Number of Bathrooms more accurate fields have been standardized:

Full Baths – Shower, bathtub, sink and toilet

$\frac{3}{4}$ Baths – Three fixtures of any of the above

$\frac{1}{2}$ Baths – Two fixtures of any of the above

$\frac{1}{4}$ Baths – One fixture (bathtub, shower or toilet)

There is a Baths Total field that will total the entries from entries from the four bath fields. This provides for an easier search, users may select to search using the Baths Total field, or by Bathroom Size fields.

When adding listings the Baths Total field will be auto-populated from the Tax Records. Notice that the Bath Size fields are required; please fill out the break down in each field. Should the correct entry be zero (0) that is acceptable.

The screenshot shows a form with several fields. The 'Baths' section is highlighted with a red box. It contains four fields: 'Baths: Full', 'Baths: 3/4', 'Baths: 1/2', and 'Baths: 1/4'. Each field has a dropdown menu with '0' selected. The 'Baths: Full' field is currently set to '1'. To the right of these fields is a 'Sale Type' dropdown menu with options: 'Standard', 'In Foreclosure', 'Notice Of Default', 'Real Estate Owned', and 'Short Pay / Subject To Lender'.

NOTE:

Information that auto-populates from the tax record may not be accurate. It is the responsibility of the listing agent to input current and correct information.

<p>SHORT-PAY GUIDELINES</p> <p>(THESE ARE MERELY GUIDELINES, NOT RULES)</p>
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DEFINITION – SHORT-PAY

In situations where the purchase price is less than the outstanding loans and liens against a property the Seller or Seller's agent may be able to negotiate with the lender for a reduced payoff of the loan (short-payoff). In a typical short-payoff situation, the lender agrees to accept less than the balance owing on the outstanding loan(s) and the lender agrees to pay the closing costs associated with the transaction, including real estate commissions. Generally, the lender will not permit the Seller to receive any proceeds from such a transaction. In some situations, the lender will require the Seller to pay some of the Seller's own funds to close the transaction.

SUGGESTED PROCEDURES

LISTING BROKER

1. Prior to taking the listing, advise seller, in writing, that there may be alternatives other than short payoff and to seek the advice of a CPA and/or Tax Attorney regarding such alternatives and any tax consequences regarding same.
2. At the time of taking the listing and prior to submission to MLS, attempt to contact lender(s) requesting the lender's guidelines for a short-pay.
3. Attempt to obtain information on ALL loans and liens on the property including past due payments, tax delinquencies, etc.
4. Check-off appropriate box on MLS information sheet regarding short-payoff. The CLB box should be checked whenever listing broker can reasonably anticipate that a short-payoff situation might occur even though no short-payoff would exist with a full price offer. Indicate first loan balance and total other liens balance based on your research.
5. Discuss with Seller his/her hardship situation and lender requirements for short-pay. Review list of documents Seller will need to provide to lender.
6. Provide potential selling brokers with ALL pertinent information so as to allow buyer to make a determination regarding submitting an offer on the property.
7. In the event that the lender does not accept Buyer's offer as written, listing agent should attempt to have lender respond, IN WRITING, as to lender requirements and should immediately deliver this to Buyer's Broker.

HOW TO REPORT THE STATUS OF SHORT SALE LISTINGS

The MLS department receives many complaints from agents who call on active listings only to be told offers are not being accepted or there are multiple offers already in place. If a listing is in the MLS as active, the MLS Rules require that the offer be presented. Putting in the remarks "Not accepting offers at this time", or "Do not show property", while leaving the status as active may subject the listing agent to an MLS assessment. If a listing is a short sale or REO and offers are being accepted (awaiting approval) you should change the status to "Back-up". This allows the listing to show up in active searches while putting other MLS members on notice.

7.18 Estate Sale, Probate, Bankruptcy, Auction, and Lender Approval Listings.

7.18.1 Probate and Bankruptcy Listings. Compensation offered through AOR/MLS to cooperating brokers on probate or bankruptcy listings is for the amount published therein as long as the cooperating broker produces the contract which is ultimately successful and confirmed by the court, if court confirmation is required. In the event the contract produced by the cooperating broker is overbid in court and the overbid contract is confirmed, the original cooperating broker shall receive the amount of compensation specified as “unconfirmed cooperating broker’s compensation” or “u.c.b.” in the property data profile sheet and on the MLS. For probate listings, the compensation offered through the MLS under these rules and this section shall be considered an agreement as referred to in California Probate Code Section 10165 and is specifically intended to supersede any commission splits provided by statute as permitted in Section 10165. This section contemplates that probate and a bankruptcy judge have broad discretion, and therefore is not intended as a guarantee of a specific result as to commissions in every probate or bankruptcy sale.

7.18.2 Lender Approval Listings. Compensation offered through the MLS to cooperating brokers on listings which require lender approval (commonly referred to as “short sale” listings) is for the amount published therein unless the listing broker indicates on the MLS the following: (a) the fact that the sale and gross commission are subject to lender approval; and (b) the amount or method by which the compensation offered through the MLS will be reduced if the lender reduces the gross commission. This section does not allow an additional reduction from the commission offered for items such as a short sale negotiator fee or other administrative costs of the transaction. Any reductions from the commission offered for such items should be factored in as a reduced amount the listing broker initially offers to a cooperating broker and may not be made a condition of the offer.

7.18.3 Auction Listings. Compensation offered through the AOR/MLS to cooperating brokers on listings which are offered by auction is for the amount published therein unless the listing broker indicates in the AOR/MLS that the sale and gross commission are based upon sales price. The listing price in the AOR/MLS shall be the reserve or minimum bid and must state “compensation to cooperating agent for a successful bid only” in the Agent/Private Remarks only. Auction listings shall have written listing contracts, as required by the AOR/MLS, including terms and conditions of auction, provided to the AOR/MLS. The Public Remarks must contain the following: “The List Price is the reserve or minimum bid subject to the seller(s) acceptance.”

OFFICE/MLS INFORMATION TIP'S

The image shows a screenshot of a web-based form titled "Residential Detail". The form has several tabs: "Specs", "Description", "Features", "Land/Terr", "Office/MLS", "Green", and "Open House". The "Office & MLS" tab is active. The form contains the following fields and callouts:

- Office & MLS** section:
 - Current Status: Active
 - ML Number:
 - Address:
- Listing Office Compensation:** A dropdown menu with a callout box labeled "RULE 7.15".
- Dual/Variable Rate of Commission:** A dropdown menu with a callout box labeled "RULE 7.25".
- Listing Type:** A dropdown menu with a callout box labeled "RULES 7.5 and 7.8".
- Service Type:** A dropdown menu with a callout box labeled "RULES 7.5, 1, 2 & 3".
- Showing Contact Information:**
 - Showing Contact Type:
 - Showing Contact Name:
 - Showing Contact Phone:
- Occupant Information:**
 - Occupant Type:
 - Owner's Name:

7.25 Dual or Variable Rate Commission Arrangements (Listing Broker Advantage).

The existence of a dual or variable commission arrangement shall be disclosed by the listing broker by a key, code, or symbol as required by the MLS. A dual or variable rate commission arrangement is one in which the seller(s) or owner agrees to pay a specified commission if the property is sold by the listing broker without assistance and a different commission if the sale results through the efforts of a cooperating broker, or one in which the seller(s) or owner agrees to pay a specified commission if the property is sold by the listing broker either with or without the assistance of a cooperating broker and a different commission if the sale results through the efforts of a seller. The listing broker shall, in response to inquiries from potential cooperating brokers, disclose the differential that would result in either a cooperative transaction or, alternatively, in a sale that results through the efforts of the seller(s) or owner. If the cooperating broker is representing buyer(s) or lessee(s), the cooperating broker must then disclose such information to his or her client before the client makes an offer to purchase or lease.

7.8 Mandatory Submission.

Within 2 days after all necessary signatures of the is later, on any exclusive right to sell or exclusive agency listing on one to four unit residential property and vacant lots located within the service area of the MLS, Broker Participants shall (1) input the listing to the service, or (2) submit a seller-signed exclusion in accordance with section 7.9 (Exempted Listings) to the MLS. All necessary signatures are those needed to create an enforceable listing, which generally means all named signatories to the listing agreement. In the event there are known additional property owners not made signatory to the listing, the Listing Broker shall disclose said fact to the MLS and state whether the listed seller will make the sale contingent on the consent of the additional property owners. In the event the listing agent is prevented from complying with the 2 day time period due to seller's delay in returning the signed listing agreement, the Listing Broker must submit the listing to the MLS within 2 days of receipt back from seller. The MLS may require the Listing Broker to present documentation to the MLS evidencing the seller's delayed transmission. Only those listings that are within the service area of the MLS will be input. Open listings or listings of property located outside the MLS's service area (see Section 7.10) are not required by the MLS, but may be input at the Broker Participant's option.

7.15 Unilateral Contractual Offer; Sub-agency Optional.

In filing a listing with the AOR/MLS, the Broker participant makes a blanket unilateral contractual offer of compensation to the other MLS Broker participants for their services in selling the property. Except as set forth in Rule 7.18 below or pursuant to California Civil Code Section 1087, a Broker participant must specify some compensation to be paid to either a buyer's(s') agent or a subagent and the offer of compensation must be stated in one or a combination of, the following forms (1) a percentage of the gross selling price; or (2) a definite dollar

amount. The amount of compensation offered through the MLS may not contain any provision that varies the amount of compensation offered based on conditions precedent or subsequent or on any performance, activity, or event. Furthermore, the AOR/MLS reserves the right to remove a listing from the AOR/MLS database that does not conform to the requirements of this section. At the Broker participant's option, a Broker participant may limit his or her offer of compensation to buyer's(s') agents only, to subagents only, or make the offer of compensation to both. Any such limitations on the contractual offer of compensation must be specified on the property data form and in the MLS. The amount of compensation offered to buyers' agents or subagents may be the same or different but must be clearly specified on the property data profile sheet. Broker participants wishing to offer sub-agency to the other MLS Broker participants must so specify on the property data profile sheet and on the MLS, otherwise the offer of compensation does not constitute an offer of sub-agency.

NOTE:

Agents using the term "Net Sales Price" in the Agent Remarks section will receive an email from the Compliance Committee which advises them to take this wording out of the listing or face an assessment or attendance at an MLS class.

Agents MAY indicate in the Agent Remarks that a) the sale and gross commission are subject to lender approval and b) the amount or method by which the compensation offered through the MLS will be reduced if the lender reduces the gross commission, i.e., Any reduction in gross commission will be split 50/50.

Listings are also checked to be sure Agents have marked Short Pay or Real Estate Owned in the Financial Information section. If you indicate in the Agent Remarks section that the listing is a Short Sale or Bank Owned, you must ALSO check the appropriate box in the Financial Information section.

Accurate information is important for both the buyer/seller and the agents involved in the transaction. The more accurate the information in the MLS, the smoother the transaction will be.



For a better understanding of Virtual Office Websites (VOW) and rules please refer to MLS RULE 19. Virtual Office Websites.

DID YOU KNOW ABOUT LAND FEE/LEASE FIELD?

We are often asked to explain the meaning of the mandatory Land Fee/Lease field on the listing input form. The options offered are "FEE" or "LEASE". Following are definitions for MLS purposes:

- Select FEE if the land is to be sold as part and parcel of the property with no lease payment involved
- Select LEASE if the property is on leased land.

RESIDENTIAL LISTING AGREEMENT (RLA FORM) AND SELLER INSTRUCTION TO EXCLUDE LISTING FROM THE MLS (SEL FORM)

AS OF 2009 THE CALIFORNIA ASSOCIATION OF REALTORS® HAS MADE SOME CHANGES TO TWO OF IT'S FORMS:

RESIDENTIAL LISTING AGREEMENT (RLA) AND SELLER INSTRUCTION TO EXCLUDE LISTING FROM THE MLS (SEL).

Changes were made so that REALTORS® have the right tools to comply with the settlement agreement entered into by NAR and the Department of Justice with regard to MLS' and VOW's. Under the settlement agreement, the seller's listing or certain information about seller's listing may only be excluded from an Internet site receiving data from the MLS if the seller has given specific instruction to exclude the information. The MLS paragraph in the RLA has been modified to reference the Internet opt-out options. The SEL has been revised to include optional paragraphs allowing the seller to choose among the various opt-outs (No Internet display at all; No property address on Internet displays; No blogging or comment feature in Internet display of seller's property; No automatic valuation feature on Internet display of seller's property).

Both the RLA and SEL forms can be found by going to www.car.org and then clicking on **ZIPFORMPLUS**.

UNDERSTANDING MELLO-ROOS

Q. What is a Mello-Roos District?

A Mello-Roos District is an area where a special tax is imposed on those real property owners within a Community Facilities District. This district has chosen to seek public financing through the sale of bonds for the purpose of financing certain public improvements and services. These services may include streets, water, sewage and drainage, electricity, infrastructure, schools, libraries, parks and police protection to newly developing areas. The tax you pay is used to make the payments of principal and interest on bonds.

Q. Are the assessments included within the Proposition 13 tax limits?

No. The passage of Proposition 13 in 1978 severely restricted local government in its ability to finance public capital facilities and services by increasing real property taxes. The "Mello-Roos Community Facilities Act of 1982" provided local government an additional financing tool. Proposition 13 tax limits are on the value of the real property, Mello-Roos taxes are equally and uniformly applied to all properties.

Q. When do I pay these taxes?

By purchasing an interest in a subdivision within a Community Facilities District you can expect to be assessed for a Mello-Roos tax which will typically be collected with your general property tax bill. These special tax payments are subject to the same penalties that apply to regular property taxes.

Q. How long does the tax stay in effect?

The tax will stay in effect until the principal and interest on the bonds are paid off along with any reasonable administrative costs incurred in collecting the special tax or so long as it is needed to pay the expenses of services, but in no case shall exceed **40 years**.

Q. What happens if a general tax payment is not made on time?

Because the Mello-Roos tax is typically collected with your general property tax bill, the Facilities District that obtained the lien may withdraw the assessment from the tax roll and commence judicial foreclosure.

Q. What is the basis for the tax?

Most special taxes levied on properties within these districts have been structured on the basis of density of development, square footage of construction, or flat acreage charges. The act, however, allows for considerable flexibility in the method of apportionment of taxes, and the local agencies may have established an entirely different method of levying the special tax against property in the district in question.

Q. How much will the Mello-Roos payment be?

The amount of tax may vary from year-to-year, but may not exceed the maximum amount specified when the district was created. In the case of the purchase of a new house within a subdivision, the maximum amount of the tax will be specified in the public report. The Resolution of Formation must specify the rate, method of apportionment, and manner of collection of the special tax in sufficient detail to allow each landowner or resident within the proposed district to estimate the maximum amount that he or she will have to pay.

Q. How is the special tax reflected on the real property records?

The special tax is a lien on your property, essentially like a regular tax lien. The lien is recorded as a "Notice of Special Tax Lien" which is a continuing lien to secure each levy of the special tax.

Q. How are Mello-Roos taxes affected when the property is sold?

The Mello-Roos tax is assessed against the land, but is not based upon the value of the property; therefore, the possible increased value of property does not affect the amount of the tax when property is sold. The amount of the tax may not exceed the original maximum amount stated in the Resolution of Formation. Any delinquent payments must be satisfied before the sale of the real property since the unpaid amounts are a lien against the property.

PHOTO'S FOR LISTING SUBMISSION

MLS RULES 11.5 AND 11.6

11.5 Photographs on the MLS.

By submitting photographs to the MLS, the Participant and/or Subscriber represents and warrants that he or she either owns the right to reproduce and display such photographs or has procured such rights from the appropriate party, and has the authority to grant and hereby grants the MLS and the other Participants and Subscribers the right to reproduce and display the photographs in accordance with these rules and regulations. Use of photographic media by a subsequent listing agent requires prior written authorization from the originating participant and/or subscriber or other appropriate party with the legal right to reproduce and display such photographs. Except by the MLS for purposes of protecting its rights under Section 11.6, branding of photographs, virtual tours or any other photographic representation with any information or additional images, including but not limited to photos displaying "for sale" signs posted on the property, is prohibited. At least one (1) photo or graphic image accurately displaying the exterior of the listed property (except where sellers expressly direct that photographs of their property not appear in MLS compilations) is required to be posted on the MLS within 5 days of submission of the listing in all categories other than Lots and Land.

11.6 Copyright Ownership.

All right, title, and interest in each copy of every MLS compilation created and copyrighted by the MLS, and in the copyrights therein, shall at all times remain vested in the MLS. The MLS shall have the right to license such compilations or portions thereof to any entity pursuant to terms agreed upon by the Board of Directors. All right, title, and interest in each copy of every compilation created by any technology solution aggregator, such as and including California Real Estate Technology Services, Inc. ("CARETS"), shall, pursuant to agreement with the MLS, at all times remain vested in the aggregator.

In short

A minimum of one (1) photograph/rendering of the property must be entered into the MLS within five (5) business days of the listing entry date. The photo must be of the exterior of the property, except for Land/Lot property type. This requirement does not apply to any listing that has been cancelled prior to the five (5) day entry period lapsing. Images uploaded to the system are meant to be representative of the listing and its surroundings; pictures of the property, floor plans, maps (as long as they are not copyrighted), pictures of surrounding areas (parks, schools, etc.).

Images MUST NOT include:

1. Agent or Broker photos
2. Agent or Broker names
3. Phone numbers
4. Website addresses
5. Email addresses
6. Any billboards "For Sale" signs, "Open House" signs, or any type of special promotion signs, etc.
7. No advertising or Marketing pieces
8. Messages or solicitations of any kind
9. Offensive photographs or images*
10. Photo branding to place agent name, logo or other identifying information over the photo
11. Photos of people, animals or other items not directly related to the property

*The definition of "offensive" shall be left to the discretion of the Association or MLS.

Virtual Tour and Virtual Media Links adhere to the same rules and regulations as any photographic submissions.

LISTING MANAGEMENT-ADD EDIT STEP BY STEP

Where do I start?

Log into MATRIX through SRAR Homepage

Click on the “ADD/EDIT” tab along the top of the MATRIX home page

If you are a *new* ADD/EDIT user, scroll to the “Roster” bar in the ADD/EDIT tab

In the “Quick Modify” box enter your full member number

Click on “Edit”

When the “Modify Agent” window appears click on “Change Contact Information”.

A screen with your current contact information will appear, review the information already entered, and update any incorrect information.

When you are satisfied with your new information, click on the “Submit Agent” button on the bottom left, OR if NO changes need to be made, click on the “Cancel Input” button to take you back.

✓ *NOTE: Cancel buttons in MATRIX mean Go Back*

In order to utilize the Realist Auto Fill function you must do the following:

Click the Links Tab on the Matrix homepage.

Scroll down to Realist Tax Classic and accept the end user agreement – NEXT

Scroll down to Realist Tax 2.0 and accept the end user agreement.

✓ *NOTE: You must accept the end user agreement in both data bases for the Auto Fill to work, however when performing any search in Realist always use Realist 2.0 as this is the most recent data base and Realist Tax Classic will eventually be eliminated. The Realist tab on your Matrix home page connects to Realist Tax 2.0.*

Let's start a New Listing!

For this example we will be using the “Fill from Tax” function.

Click on the “ADD/EDIT” tab along top of the MATRIX home page.

Scroll down to the “Listing” section.

Review the property type listing options you have and then click on the appropriate property type.

Click on “Add New” to the left of the identified property type. (This tip will use the “Residential” option).

Once you have selected the property type you are listing and have clicked on “Add New” you will be taken to a screen titled “Add a New Residential Listing”.

The default for this screen is “Fill From Tax”(however you can click on the “Copy My Listing”* or “Start with a blank listing”).

- Scroll to the county field and click on the county your property is located in.
- To the right of this field you will see an area that allows you to enter a street address.
- Enter in the field that says “Street #” the NUMBER ONLY of the address.
- Enter in the field that says “Street Name” the NAME ONLY (no suffix, i.e.: St., Ave., Blvd., etc.)
- Scroll to the bottom of the screen and click on “Search” button.
- When the tax screen appears, review the address and if it is the correct one, click on “Fill” on the left side of the APN number.

✓ *NOTE: To access the Tax information in an Auto-fill function you MUST be registered in REALIST Classic and Realist Tax 2.0. Go to External Links, click on Realist Classic and accept end user agreement. Repeat to register for Realist Tax 2.0.*

*Copy My Listing tips to follow.

You will now be taken to the Residential (or other property type) input screen where you will begin to enter your listing.

The first page you are taken to is labeled “Basics”

- ✓ **NOTE: EVERY field that is highlighted anywhere in MATRIX IS a REQUIRED field. Start by entering the information in each of the highlighted fields. (In some fields, depending on where your listing is located, certain fields will become mandatory as you enter information – these fields are information dependent).**

To select a City, click on the down arrow to the right of the field, move your cursor to INSIDE the field ANYWHERE and begin to type your city name, it should become a highlighted choice, click it to place it in this field.

The same is true with the Area field, except choices are dependent on the information entered in the City field. Therefore, your choices in this field are narrowed.

- ✓ *NOTE: Listings in Santa Clarita require Tract Code. By your city and area selections your Tract Code options will be condensed to those that apply.*
- ✓ *NOTE: The City and Area must reflect the location of the property – not the location of the listing agent.*

➤ **Placing a Map Pin on your property IS required.**

Scroll to the right of your listing information and you will see a small map.

Under the map you will see the words “Place Pin by Address”. You will click on “Place Pin by Address”.

The next page is “Description”. Although this is not a required page, there are MLS rules that DO apply when entering information in the fields. A brief description of what is and what is not allowed is written in red above each field.

Page three is called “Features”. The features page allows you to enter the features of the property. On the right side of each field is a small scroll bar which allows you to view and choose all the various features available for that field. You can click on as many as you want PROVIDED that they are in fact a feature of the property.

- ✓ *NOTE: To select more than one feature in a single field, click on your first choice and then for all subsequent choices scroll down the list and as you find more features that apply, hold down the “Cntrl” button on your computer and click the left mouse key. You can also remove items in the same manner, go to the incorrect choice hold down “Cntrl” and click left key down and click off.*

Next is **“Land/Terms”**. “Lot Number” and “Tract Number” information can be found by clicking on your “REALIST” tab on the top of the MATRIX homepage. Enter your street number and name, click Search. When the Property Detail report appears scroll down to the section that is titled Tax Information, go to Legal Description, the Tract Code and Lot number are there.

- ✓ *NOTE: REALIST is an external link in MATRIX. By clicking on/opening this tab you will NOT lose your place in MATRIX.*

The **“Office/MLS”** page contains information that is considered confidential. Information here includes compensation, security information, showing instructions, etc.

- ✓ *NOTE: ALWAYS check the preferred order of contact field AND the Listing Agent Public ID. Listing Agent information MUST be in these fields.*

The “Green” Tab allows you to enter information about your property that may be “Green” certified. In this tab you can also identify features that are Solar efficient, or Energy Efficient, etc. This is NOT a required page, however if you should have a property that is being marketed as “Green Certified”, the proper certifications must be present.

You may enter “**Open House**” dates at this point.

Once you have completed your entry information you can do one of the four following:

Each of these options are available on the bottom of each page of your input form.

1. Preview – this allows you to see what information you have listed in a Full Agent report type format. When you are done reviewing your listing you may click Continue Editing to return to your input form.
2. Cancel Input – This allows you to Cancel all information entered.
3. Save to Partially Completed Listings – which allows you to save any information entered, but NOT ready to submit at this time.
4. Submit Listing – If your listing is complete a message “Input Succeeded” will appear. By clicking on Submit Listing you are submitting the listing to the MLS. If you have any errors or omissions on your input form you will be alerted by a RED X on the page where the error(s) are located. You will also be alerted to the field the error OR omission is by a RED X. Make your corrections if any, and re-submit.

✓ *NOTE: It is suggested that you Save Partially Completed Listings if you get up from your computer, MATRIX will log you out after 30 minutes and you will lose any information entered unless you have saved it.*

Retrieving Partially Completed Listings

Go to your ADD/EDIT tab and click.

Scroll down to “WORK AREA” and click; then click on the line that tells you how many Partially Completed Listings you have. The listing will appear, and by clicking on the listing you were working on, you will be taken back to the input area where you left off. You can then resume your entries or Submit Listing – this area is a storage cabinet for listings that you are working on, listings that are incomplete and that HAVE NOT BEEN SUBMITTED TO THE MLS! NEVER go back to this area once you have submitted a listing to Matrix. If your listing has gone through successfully you will be alerted with a screen that says “INPUT SUCCEEDED” and an MLS# will have been assigned.

To upload pictures, click on the Add/Edit Photos option and then click on the Browse button.

Adding Photos to your Listing

You can add pictures to your listing at any time, however you are required to have 1 picture of the outside of your property within 5 business days.

At the time you have submitted your listing you can add your Photo at that point by clicking on the Add/Edit Photo button located on the lower left of the Input Succeeded screen.

Click on the button.

Click on the pictures you want uploaded and then click open – you can click on multiple pictures at once by holding down the “Control” key and clicking on the picture.

You can move the pictures into the placement order you want by hovering over the top bar on the picture and then holding left key, drag the picture into the spot you want it in.

To add verbiage, click on the picture and then under the picture on the left bottom “Enter Description” should be clicked. Enter your description and click done, and then save.

- ✓ *NOTE: MLS Rules require that a **minimum** of ONE picture of the exterior front of the listed property be entered. You will receive a violation if ONE picture is not entered.*
- If you will be entering photos at a later date you would use the Edit function in MATRIX.
- Click on Add/Edit tab.
- Click on the Quick Modify Function.
- Using the drop down arrow to the right of the field, select the property you will be adding photos to.
- Scroll to the bottom of the page and click on “Manage Photos”.
- Follow directions as noted above.
- ✓ *NOTE: This process can also be done by using your my Listings widget.*

How do I edit a Listing?

Go to ADD/EDIT tab on MATRIX home page and click.

Scroll to Quick Modify and click on the “down arrow” on the right side of field.

Select the property you wish to update. Click.

A series of options in STATUS areas to modify will appear. Click on the Item you want to modify, the beauty of this is that the information you are required to enter will appear for the specific status change items.

- Anything that is changed in the body or language of the original listing you will use the Residential Detail option in the edit mode. This includes a price change, additional information in features or description, etc.
- You can change contact information for your listing by clicking on the Change Contact Information option.
- Open Houses can be added.
- To change the status on a listing you will chose the status your listing is going in to and the following will apply:
 - ❖ ***Any listing that is Back-up, Pending or Sold MUST reflect the selling/co-selling agent CalBRE number and information.***
 - ✓ To enter information for an agent that is a member of CARETS simply click on the “Find” option located to the left of the field and enter the selling agents public ID or name, click on Search. ALWAYS double check that the agent information you are selecting to use the Fill function on is the MOST CURRENT and CORRECT information. Once you have clicked on the Fill function, all required information for that agent will auto-fill onto your listing. Click Submit Listing. If all information has been filled out your listing will be accepted.
 - ✓ To enter the identification and CalBRE number for an agent who is NOT a registered agent in CARETS, you will click on “Not Finding the Selling Agent ID? [Click Here](#)”, a list of “Out of Area” codes for each association will appear. In the case of the **listing agent** being in the Southland Regional Association of REALTORS, you would use the code for Southland (FOUT). Enter the code in the field that reads “Selling Agent Public ID”, and click Submit Listing. Your screen will then show the RED dot on a NEW tool bar that reads “Required Selling and Co-Selling Agent Information”, click it on. You will then manually enter the CalBRE number and any other additional information you may have. You then click Submit Listing.

- ✓ **NOTE: NEVER go back to “Work Area” to update or edit a listing. This could create a duplicate listing in the MLS which is a violation.**

COPY MY LISTING TIPS

The Copy My Listing feature allows you to carry information over from a listing that you had in the past. To use this function it **MUST** be one of your own listings. You should have an MLS# or the address before you begin this function.

- Click on the Add/Edit tab.
- Click on “Add New”. (Be sure you are using the correct property type)
- When you are taken to the next screen, click on the “Copy My Listing” button.
- When entering the MLS# click on “Fill From” located on the right side. To enter an address, after address is entered click on search, and then if the address is correct click on the word “Fill”.
- **Once you are in the listing form it is IMPERITIVE that you review EVERY SINGLE TAB AND FIELD ENTRY PRIOR to submitting the new listing.**
 - ✓ **NOTE:** Information in Basic, Description, Features, Land/Terms, MLS/Office, Green and even Open House will auto fill (if then open house has a date that is still valid) . It is important to note, particularly in the MLS/Office tab that while not all information auto fills, showing instructions, key safe information, agent remarks , sending information to the internet **DO** auto fill – this is **IMPORTANT** to review **BEFORE** you submit a listing. In Land/Terms the financial choices auto fill and **MAY** be different on the new listing. Review your original remarks in description, as they may no longer be valid or may need to be updated.
- Photos can be added in the same way as with any other submitted listing. They **DO NOT** auto fill.