***Principal Broker Quarterly*: August 2016, Issue**

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**Continuing Education Opportunities: OAR State Convention in 60 days & November 18**

OREF is gearing up for the 2016 OAR State Convention in Sunriver. The OREF panel presentation is preparing via a mid-August teleconference call between panelists, Forms Committee leadership and facilitator Phil Querin. The **Thursday, September 28**, panel presentation topic is ***Brokering the Deal: success with solid financing, mastering appraisals/ inspections and navigating seller concessions and buyer contingencies.*** A big thank you goes to our panelists of John Baker, Windermere Central Oregon; Craig Edwards, Bend Law Firm; Jered Helton, Umpqua Bank; Noah Blanton, OREF Forms Committee Title/Escrow representative and Jeff Schopfer, Amerititle escrow officer. OREF is an anchor sponsor for three consecutive years; both OREF and zipLogix will be in the exhibitor booth during the OAR State Convention.

**November 18,** is the 4th quarter continuing education. *Negotiating Buyer Repairs: # 022 A Buyer Repair Addendum and # 022 B Seller’s Response to Repair Addendum* is the tentative topic at hand.

Registration with OREF will begin in October 2016 at http://orefonline.com/events/.

Brokers can still participate in the **3 hours FREE CE on-line curriculum of the 2016 Residential Sale Agreement (# 001) and the Matrix (# 001 MX).** Log on to: <http://www.onlineed.com/system/pages/courses.php?package=382&f=show_details&state=Oregon&field=2&nc=1>, complete the three hours and turn your CE into OREA. To date, 3,000 + Oregon brokers have participated.

**mlsCONNECT® Data Fields That Sweep to OREF Cover Sheet**

OREF subscribers have inquired “what fields do sweep to the mlsCONNECT/Push/SSO.” OREF in concert with zipLogix and the eight Oregon MLS have been invited to compile a list of the data fields that sweep to OREF cover sheet. As of August 1, mlsCO (central Oregon), SOMLS, WVMLS and RMLS™ have shared their lists; OREF will post these on the website for subscriber awareness. These data lists will be located at [www.orefonline.com](http://www.orefonline.com) in the News links along with the mlsCONNECT®/Push/SSO information (Subscribers option to push or pull the data from sources of MLS, RPR and OREF).

For more information, call OREF at 503 459-0195.

**How Do I Use mlsCONNECT®?**

Three resource areas exist for subscribers to learn more about their mlsCONNECT® feature associated with their Oregon Forms Library annual subscription:

* How do I use mlsCONNECT®?
	+ FAQs: <http://orefonline.com/resources/frequently-asked-questions/>
* mlsCONNECT® Information, <http://orefonline.com/news/>
	+ Fourth article on the news link page
* Your Multiple Listing Service may also have instructional links (NavBar, Youtube video, other informational resources).

**zipForm® Usage Training**

zipLogix certifies trainers across the nation. In Oregon, there are approximately seven trainers that are resources to Oregon brokers and brokerages. Log on to <http://orefonline.com/resources/> and click on the Oregon zipForm® trainers to schedule brokerage training opportunities. Also, brokerages and brokers can access the <https://www.youtube.com/watch?v=_Twh8V6uX1o&feature=youtu.be> video for self- instruction on creating a transaction and more. zipLogix’s training calendar link also provides regularly scheduled training resources: <http://www.zipform.com/training/trainingcalendar.asp>

**Q and A: Information You Can Use**

OREF has developed a set of forms intended to provide useful guidance to real estate professionals documenting a variety of Oregon real estate transactions. In addition, OREF periodically provides, in its print and digital publications, guidance with respect to questions commonly posed by brokers. Neither OREF's forms, nor the statements made in its print or digital publications, are intended to constitute or provide legal advice. OREF encourages all brokers to seek guidance from their principal brokers, and when necessary, from legal counsel, regarding real estate transaction questions.

In addition, OAR offers members an annual subscription to the OAR Real Estate Hotline, which also provides brokers with consultation on real estate transaction issues. Brokers wishing to access the Hotline can find more information at <http://oregonrealtors.org/legal/action/legal-hotline>.

**Q:** As a Principal Broker, how can I best train and educate my brokers regarding all things OREF?

**A:** A top 7 list of training, education, informational musts are as follows:

1. Have broker understand the # 001 Residential Sale Agreement and Matrix # 001 MX. Brokers can also earn 3 FREE CE per the [www.onlineed.com](http://www.onlineed.com) on-line curriculum offering. Understanding the “entire 001 Sale Agreement, matrix instructions clause by clause and the definitions instruction is baseline when working with clients and building a properly executed transaction.
2. Print off # 000, Oregon Forms Library and know what forms exist in Library.
3. Learn the annual electronic subscription from cover sheet to electronic signature gathering.
4. Learn how to use the mlsCONNECT®/Push/SSO features (see more information in this issue of the *Principal Broker Quarterly*).
5. Become more familiar with the Multiple Listing Service listing agreement and other MLS forms. Your annual subscription includes Oregon Forms Library and your MLS libraries (quarterly subscriptions are separate from your annual OREF-zipForm®subscription).
6. Become familiar with your brokerages templates and utilize them in your transaction.
	1. FAQs: <http://orefonline.com/resources/frequently-asked-questions/>
7. Log on to [www.orefonline.com](http://www.orefonline.com) and click on the informational resources for additional training:
	1. Training (previous webinars, seminars, audio recordings)
		1. <http://orefonline.com/resources/>
	2. News: review previous issues of OREF E-News (*PB Quarterly* and *Subscriber Update*)
		1. <http://orefonline.com/news/> 12 + previous news releases contain helpful info.
	3. Articles: <http://orefonline.com/resources/articles/>

**Q:** How do I learn more about Reading Oregon’s Seller Property Disclosure Form?

**A:** The seller’s property disclosure form is second only to the home inspection report in giving

buyers important information about the condition of the home they intend to purchase. However, these

are two entirely different documents. The home inspection report is prepared for the buyer by an

independent unbiased professional source. While such reports are certainly not infallible, and are

contractually limited in scope, they generally can be relied upon to address visible, or readily

ascertainable, adverse conditions in the home and operating systems. However, the property disclosure

form is generated by the seller of the home. MORE…

<http://q-law.com/tips-reading-oregons-seller-property-disclosure-form/>

**Q:** In negotiating buyer’s repairs, how do I utilize forms # 022 A and # 022 B?

**A:** Refer to *Realtor® Guide for OREF Statewide Forms* (Form # 000, page four) in your Oregon Library - zipForm® subscription. A snapshot form purpose and Realtor® tips is provided below.

|  |  |  |  |
| --- | --- | --- | --- |
| OREF # 022 A | Buyers Repair Add. | Prepared by buyer following completion of professional inspection, setting out buyer’s requested repairs or seller concessions | Use in conjunction with OREF 22B & 023.Don’t’ ask for everything identified in report—be selective.Broker to broker conversations in advance of delivering the form to listing broker can avoid surprises and upset.Remember, lender has a right to see all addenda between parties and all reports. |
| OREF # 022 B | Seller’s Response to Repair Addendum | To be completed by sellers identifying what repairs or concessions they will make. | Note there is no deadline for seller to get back to buyer – reason is because the Inspection Contingency Period (Period) is running.Buyer brokers must “watch the clock” to make sure the Period doesn’t expire, since a failure to object within required time constitutes acceptance of the condition property as-is.Only way for buyer to get out after Period expires is to forfeit their E-M deposit. |

Q: How do I create a new checklist in a transaction?

A: <http://support.zipform.com/tms/KBA-9004.asp>

Q: How do I email forms and documents?

A: <http://support.zipform.com/zfplus/KBA-7003.asp>

Q: Can I create my own Checklist Templates with zipTMS™?

A: Yes, you may create and use custom Checklist Templates with zipTMS™.

<http://orefonline.com/resources/frequently-asked-questions/>

**Electronic Signature Gathering: Digital Ink or Docusign**

The value of having electronic signature gathering is to save you and your client’s time and money in wrapping up your real estate transaction. Some brokerages have a master account where you have a sliding fee scale based on the size of your brokerage/brokerages. If your brokerage does not, each individual can purchase his or her electronic signature gathering product by contact OREF, LLC and we will have zipLogix contact you for this product enhancement that works with your annual electronic subscription.

For information on **setting up Digital Ink or Docusign,** log on to the FAQ links at <http://orefonline.com/resources/frequently-asked-questions/>.

**OAR’s Technical Support-Member Benefit—Computers, printers and other digital support**

<http://oregonrealtors.org/resources/membership-resources/member-benefits>

With the **Oregon Association of REALTORS®** [**Tech Helpline**](http://www2.realtoractioncenter.com/site/DocServer/THL_Everyone_Has_Questions_Oregon.pdf?docID=35940&autologin=true), you never need to call your nephew again for tech support. Computers, printers, cell phones, tablets, software, blue screens of death, and just about anything digital - they do it all and it's included in your membership with the Oregon Association of REALTORS®. The Tech Helpline can even remote into your computer to fix it while you sit back and relax. Call and talk with an expert! Also available via email!

# FREE zipForm® Mobile Companion for iPhone® and iPad®

zipForm® Mobile users can download the FREE companion app for the Apple® iPhone® and iPad®.

Access additional functionality such as saving login information, accessing zipForm® Mobile faster with a convenient application, and enabling iOS integration to open PDFs in zipForm® Mobile. [Learn more about zipForm® Mobile](http://link.zipLogix.com/c/3/?T=TVRNMU9EazJOalk6TURJdFlqRTJNakV4TFRVNFptUmhOV1F5TmpCaVl6UTNaR1k0TVRobE1qUmtaV000T1RZNU1URmo6YkdOc1lYSnJRRzl5WldadmJteHBibVV1WTI5dDpZMjl1ZEdGamRDMDFaVFZqTjJGbE1UazJZVFJsTXpFeFlXVmxZamM0TW1KallqTTRaalExTVMwek0yUTNNamt4Tm1ZMVl6QTBZekl5T0dNeVltWTRaR0U0TldKbFltTXlNUQ&K=PhP4Yzfip7BYPQwTqWWSjw&uId=8&dUrl=http%3A%2F%2Fwww.ziplogix.com%2Fzfmobile%2Findex.asp%3F_cldee%3DbGNsYXJrQG9yZWZvbmxpbmUuY29t%26utm_source%3DClickDimensions%26utm_medium%3Demail%26utm_campaign%3D2016%2520-%2520Partner%2520Notifications).

If your association does not offer zipForm® Mobile as a member benefit and would like to learn more about how to do so, email or call 866-693-6767.

**Terms of Service: Violations and Illegal Use Being Addressed**

If you are utilizing OREF forms as powered by zipForms® and you are not the paying subscriber, you are illegally utilizing the electronic forms. Oregon Real Estate Forms, LLC is monitoring the illegal misuse of the real estate transactional forms and as we become aware of any and all appearances and/or actual cases of unlawful use, the associated parties will be issued a demand to cease and desist and further legal action. If you as a subscriber are aware of unlawful use, we encourage you to advise OREF by sending an e-mail to eo@orefonline.com and/or by calling (503) 459-0195.

Per the terms of service as agreed upon by all new and renewing subscribers, as well as posted on OREF, LLC website of http://orefonline.com/electronicforms.asp, the grant of license states “Licensor hereby grants you a limited, revocable, nonexclusive, personal and nontransferable license to access and use the Forms via the Internet for your own direct personal use in conducting certain professional real estate activity within the State of Oregon.”

**OREF Welcomes Your Input**

Your Oregon Forms Library is continually being reviewed throughout the year. A **nine-member Forms Committee** along with title/escrow industry representation, legal counsel and staff participate in **six (6) committee meetings per year.** Broker/subscriber input is highly valued; contact OREF by phone or via the website e-mail portal at [**http://orefonline.com/contact/**](http://orefonline.com/contact/)**.**

For more information regarding the Forms Committee, your annual forms library subscription or any other questions, **contact OREF at 503 459-0195**.

**Upcoming Calendar**

* September 8, Taste of Portland (Home Foundation), Castaway--Portland
* September 27 – 30, OAR State Convention, Sunriver
* October 20, RMLS® Trade Fair--Pendleton
* October 28, SOMLS Technology Camp--Jacksonville
* November 2 – 7, NAR Convention & Trade Expo—Orlando, FL
* December 10, the 2017 Forms Changes Summary will be posted to [www.orefonline.com](http://www.orefonline.com)
* December 28, projected date for the 2017 Oregon Forms Library to be posted to Oregon Library zipForm® subscription.

**Next Issue:** November 2016