



NRDS for New AEs

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NRDS

Facts, Figures, Shortcuts & Tips

The NRDS database contains the following records: Association, Office, Member, Education, Financial, Demographic, Member Supplemental and Office Supplemental. Below are some facts, tips, shortcuts and important information to know when working with each record.

ASSOCIATION

The Association file contains the Local, State and Regional MLS's. These are the members at the NAR level and we use this file to mail information to the associations and AEs. These are the records we use to send the AE Magazine, the weekly INS email, etc., so it is important that the POEs keep this information up to date. This is also where NAR finds the association's leadership.

- **Contact Information:** any time the association address, phone, fax and/or email address changes you will want to update that as soon as possible.
- All updates to the Association record must be made online. There is no Batch Upload or Central Database connection method to change an association.
- The Association Executive ID is the field in which you enter the NRDS ID of the AE. When an association has a new AE, always check first to see if that person already has a record in NRDS. If so, transfer them to your association, update their member record, and then update the Association record to reflect the change in the AE. If the new AE does not have a NRDS record already, please add one. Do not take the former AEs' NRDS record and change the information (name, etc) to the new AE or all the previous history on the former AE (Designations, RPAC, etc) will suddenly be attached to the new AE.
- **Leadership positions:** you will want to make sure the Current President, Current President Elect and Current Treasurer are always up to date in your Association record. Please update these fields as soon as your leadership takes office. NAR uses these fields for special mailings and invitations to your leadership. Also, when registering for NAR's annual Leadership Summit, the registration system will only allow the person who is listed in the Current President Elect field to register (along with the person listed in the AE field).
- **Association Name and Status:** two fields the POE cannot change are Association Name and Status. When a name change is approved, NAR's Board Policy area notifies the NRDS staff who update the name. Also, when a board dissolves or is merged into another board, NAR's Board Policy area notifies NRDS staff when the change is official and we then work with the association to change the records in NRDS.
- **Association Display screen:** when you pull up an Association record on NRDS, on the main display screen called Daily Active Counts. This section displays live, up to the minute counts of your active members (Status A and P) separated by Member Type and whether they are Primary or Secondary members. This is a very useful display when you are checking counts for dues, director entitlements, etc. NAR uses the active Realtor and Realtor Associate, Primary counts for such things as Director entitlements, Delegate votes, etc., so it is always a good idea to check this screen to see your latest counts.
- **Display Members:** the Display Members link on the Association record shows all active records attached to your association including all member types such as Staff, Affiliate, Realtor, etc. The list has a header break between Primary and Secondary members. This list is very useful when

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you are trying to find all the members who currently are listed as your active Secondary records so you can clean this up as needed.

OFFICE

One of the Office record's main purposes is to act as a placeholder for the Office name and address. Using this type of record there is no need to store the Office name and address over and over again in every member's record. In the Member record is a field, Office ID, that links to the Office ID in the Office record and that is how NRDS finds a member's office. This saves the POE from entering the office information in a member record and then, when the office changes address, from needing to change it over and over again in every member's record.

Offices are not members of NAR. Membership in the REALTOR® organization is individual. Therefore, offices do not 'belong' to a particular association the way members do. When you are adding a new member or moving a member to another office, always use Find an Office in NRDS first to determine if an office record already exists for that location. If so, you do not need to add another copy. Even if another association added the office first, that is OK. Any association can use any of the Offices on NRDS to link to one of their members. By checking first, this cuts down on the number of duplicate office records on NRDS which will add unnecessary records to your database, directories, rosters, etc.

- Office Contact DR, Office Contact Manager: both of these fields are required in the Office record. Office Contact DR should be the broker in charge. At many offices both the Office Contact DR and Office Contact Manager will be the same person. If this is a branch location, for example, the Office Contact DR should be the broker-owner of the firm and the Office Contact Manager should be the member in charge at that location.
- Primary associations: Offices are not members of the association but the Primary association fields indicate which association first added this office into NRDS. If your association also needs to be association with this office because you have members linked there, be sure to click the Add Secondary Association on the office record to flag your association in this Office record. You will then receive a copy of the office in your Downloads and Refreshes and will receive notification in the NRDS Daily Email Notification when changes are made to the office.
- NM Salesperson Count: this is a required, numeric field. NM is Non-member licensees who work in this Realtor office but choose not to join the association. Because of this, the DR will be assessed national dues (and also most often state and local dues as well) times the number of non-member licensees in his/her office. It is important that the POE keep this field up to date, especially at the dues deadline. Because it is a required field, if this office does not have any NM Salespersons, you must at least enter a zero in this field.
- NM Salesperson Assessment: when NAR collects the national dues from the local associations, we look at any active office with a NM Salesperson Count greater than zero. NAR multiples that by \$64 (NAR dues) and the association who is assessed for that is the office's Office Contact Manager's Primary association. Therefore, it is very important that the POE keep the Office Contact Manager field up to date.
- Main Office ID: although not required, this field plays an important role in the NAR Director Entitlement Count. Of the NAR Board of Directors, 75 seats are reserved for the 75 largest firms. These particular positions are not allocated by state or board but rather by firm. The way you would tie together various office records in NRDS into one firm is by using Main Office ID. The associations (state working with their locals, locals working together, states working together if one firm crosses state lines) should pick one office in the firm to be the main office. Then, every POE with an office record that is part of that firm needs to enter the main office's Office ID in the Main Office ID field in the various locations. NAR will then pull all active offices linked together by

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Main Office ID, group them together, and count the active Realtor and Realtor Associate members in the firm so the firms can be ranked by size.

OFFICE SUPPLEMENTAL

Although Offices are not members, POEs often do need to share an office among them, especially when more than one association has members in the same firm. In an Office record, the Primary association field indicates the POE who first added the Office record. When other POEs also need a copy of this same office you would just pull up the office, click the Add Secondary Association link and enter your Association ID in the Association field. This now allows you to get a copy of this office in your downloads and refreshes.

MEMBER

The Member record in NRDS is the 'foundation' of the association. Whether it is dues, director entitlement, rosters, delegate votes, magazine mailings, registrations, etc., everything done at the national level and usually state and local levels too is based on this Member record.

Only the POE for the Primary association of the member can Add a member to that association or change the member record. Members can update their personal information such as Home Address, Email, Birthdate, Cell Phone, etc. The member's Primary State association can also update the same personal fields that the member can change, but most choose not to and leave that up to the member and/or the member's Primary local association.

The POE Minimum Standards require that the POE updates the records in NRDS within 7 business days of the change. It is important that this is done as soon as possible because the basic information about the member can be viewed by the members, consumers, associations, etc. on realtor.org, realtor.com and other sites.

- **NRDS ID:** this is the unique 9 digit number that identifies each member. The NRDS ID is assigned by the POE when adding a record and once added cannot be changed. The NRDS ID stays with the member for life even as they leave and come back to the Realtor organization. All the member's history is attached to that NRDS ID so when a member comes to join your board always do a search on NRDS first of all statuses to see if the member already has a NRDS ID. That way you will not try to add a new member record when one already exists.
- **Member Type:** this field, along with Status, controls much of how the member records are processed and used. The Member Types of Realtor, Realtor Associate and Institute Affiliate are the member types covered in the NAR Constitution and must always be in NRDS. Affiliate, Staff and Non-Member cover other types. See all explanations below.
 - Realtor and Realtor Associates – these are the members of the Realtor organization. Some local associations' bylaws differentiate on the local level between a Realtor and a Realtor Associate but both those types are treated as Realtors on the national level.
 - Institute Affiliate – only members who hold one of the 5 commercial designations (CRE, CCIM, CPM, ALC and SIOR) can choose to join as an Institute Affiliate rather than a Realtor but they must still honor the 'three way' agreement of being a member of a local, state and the national association to keep their designation. They cannot use the term Realtor and receive no benefits from the local and state association. The Institutes, Societies and Councils (ISCs) who award these designations are responsible for collecting the dues and they are the only ones who can add or change these members in NRDS.
 - Affiliate – this type is defined on the local, and sometimes state, level and is not a member of NAR. If you receive an RPAC contribution from an affiliate you must enter

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them into NRDS or NAR cannot accept the contribution. Locals should always check with their state associations to see if the state needs the affiliates in NRDS for any reason other than RPAC.

- Staff – all AEs would be in NRDS with a member record and most should have member type of Staff. We also encourage POEs to enter all their Staff in NRDS. That way the staff person will have a NRDS ID to log into realtor.org, register for NAR meetings, take advantage of NAR's affinity programs, etc.
 - Non-Member – NAR requires only that the association report the number of non-member licensees, not their names since they are not members. However, some associations do like to track the names so if you add a non-member licensee into NRDS this is the Member Type you would use. Be aware, however, when NAR calculates dues owed by the association we use the NM Salesperson Count field in the Office record. We do not look at the Member records of Type N.
- Status: this field is used in conjunction with Member Type. The active statuses are A (active) and P (provisional). The inactive statuses are I (Inactive), T (Terminated) and X (Deceased). The S (Suspended) is a special status.
 - Member Type R and RA who have status A or P are treated the same at the national level. Both owe dues, both are counted for directors, delegate votes, etc. Both status A and P receive all benefits and privileges of Realtor membership.
 - Status I and T are both inactive statuses and in NRDS they are treated the same way. Both mean the member is dropped.
 - Status S, Suspended, are still counted for dues as they still owe dues during their suspension, but do not receive any services and are not counted for directors, delegates, etc.
 - Home Address: As of January 1, 2008, Home Address is required in NRDS when adding a new member (Member Type of Realtor and Realtor Associate). Home Address will be required for all existing members as of July 1, 2008. Members themselves can also update their Home Address in NRDS. Home Address is used by the national association, locals and states to determine a member's various voting districts when creating Call to Actions to the members for various political issues affecting real estate.
 - RE License: this is required only if the Member Type is R or RA. It is important for each POE to enter the License in the same format within a state as NRDS uses this field to check for duplicates when adding a member.
 - Preferred Publication: this field is used to determine where NAR will send the Realtor magazine to the member. When a member contacts you to tell you they are not receiving their magazine, check this field first. Then review the address in NRDS indicated by Preferred Publication to make sure it is up to date. Also, in each January issue of NRDS News, we publish the magazine production schedule for the year. Also check the schedule to see if the missing magazine is a matter of timing (i.e. the member was added into NRDS or their address was changed after that month's magazine had been mailed).
 - Primary Association: the member's Primary local and state are required field. The Primary association is the one through which the member pays their National dues. The member should have only one primary association. When NAR pulls active members for dues counts, director entitlement, delegate votes, etc., we do this by the member's primary association.
 - Join Date: this field is required and will not allow entry of a future date. National dues (and most state and local dues) are prorated for new members. NAR dues are prorated monthly. When determining the amount of dues owed by an association for their new members, NAR looks at the Join Date to determine proration. As a member transfers from association to association, the

POE should not change the Join Date or this member will be treated as a new member each time and will owe more dues at the national level each time they transfer. There is another field, Local Join Date, where the POE can indicate the date the member transferred into their association.

- Email Address: As of January 1, 2008, Email Address is required in NRDS when adding a new member (Member Type of Realtor and Realtor Associate). Email Address will be required for all existing members (Realtor and Realtor Associate) as of July 1, 2008.
- Field of Business: there are up to 4 fields where a member can indicate their specialties ranging from residential ones to commercial ones, to auction ones etc. The member has over 100 specialties to choose from. POEs should always encourage members to update these fields so that the national, state and local can target their communications and marketing to members of a particular specialty. Also in this field are the position codes for Association staff (such as Membership coordinator, GAD, Attorney, etc.) When you add a staff person into NRDS you should always fill out the Field of Business field so the staff person is listed with their position in the State/Local Leadership directory. With the staff Field of Business, NAR can also make sure that staff person receives the relevant communications from NAR.

MEMBER SUPPLEMENTAL

This record is used to store supplemental, or secondary records for a member. A member is in NRDS only one with one NRDS ID but you can link many secondary records to one member. The secondary record is used to indicate a member's secondary associations, secondary offices, secondary licenses, etc.

When a member transfers to another association as their primary, if they are active at the time of the transfer NRDS will create a secondary record for that member's previous primary association. The previous POE will be notified of this in the NRDS Daily Email Notification.

When the member's primary POE changes the member to inactive, NRDS will automatically change any active secondary records to inactive.

EDUCATION

The Education record can be used to track all sorts of education courses for the member. Any POE can add an Education record for any member.

- Code of Ethics: all POEs must store the member's Code of Ethics course in the NRDS Education record. If the member takes the COE course online at realtor.org, realtor.org will add that Education record for you. Refer to the online NRDS User manual for instructions on which fields must be filled out to enter a COE course.
- Certifications: the Education record is also used to store Certifications. The Epro certification is loaded each month into NRDS from the online course. AHWD (At Home With Diversity) is loaded into NRDS each quarter from the online course. RSPS (Resort Secondary Property Specialist) list is sent to POEs each month so they can enter it into NRDS.
- The member's certifications are displayed on realtor.org and realtor.com so it is important that the POEs keep this up to date so they will appear on the member's public record.

FINANCIAL

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The Financial record is used to store the member's dues payment information. Although not required by NAR, POEs can add Financial records for a member to indicate their national, state, local dues payments as well as RPAC payments. If entered into NRDS, this detail, along with the Education records can be viewed by the POEs before they transfer a member into their association or flag an existing member as their secondary member. If an association uses the Ecommerce Dues Invoicing module, when the member pays online, realtor.org will automatically put the payment detail information into the NRDS Financial record.

DEMOGRAPHIC

The Demographic record is a 'catch all' record that a POE can use to store all sorts of additional information about a member. One use for the Demographic record is to store Languages. Refer to the NRDS online manual or NRDS News for information on how to enter Language data into the Demographic record. If the POE enters this information it will display on the member's realtor.org and realtor.com record and members and consumers will be able to search by Language when finding a member.

ADDITIONAL INFORMATION

Several support functions are available to POEs.

- **NRDS Online User Manual:** the NRDS Manual is available online, complete with an Index, on the main NRDS menu. This manual contains information on all the records above with additional information on Transfers, NRDS Daily Email Notification, Designations, Batch Uploads, etc.
- **NRDS Online Help:** on any NRDS screen, whether you are at Find a Member, Transfer a Member, etc., look to the left and you will see a link called NRDS Help. Click this link and the screen will display the section of the online manual relevant to the screen you are on.
- **NRDS News:** published every month at the end of the month, NRDS News contains important announcements, deadlines, changes, helpful hints, etc. An email goes to the POE announcing publication. All NRDS News including an index to each year is available on the main NRDS Menu.
- **NRDS/Ecommerce Support:** the NRDS/Ecommerce support staff is available to answer the association staff/POEs questions Monday through Friday from 8:00 am to 6:00 pm Central time. You can call the support line at 1-800-868-3225 or email nrdshelp@realtors.org.

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