

# 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.
- 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. Also, do not use a POE 7000xxxx security records as the AE's NRDS ID.
- **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. The Counts section will also show the grand total of the Non Member Salesperson Count field from your active Offices with a link that will display the offices that have a number in the NM Salesperson Count field.

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- 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 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 Refreshes, CDB queue 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 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. NOTE: NAR's Consumer Advertising Campaign assessment is not part of the non member assessment.
- 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

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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 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 CDB Queue 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,

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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. Sometimes the POE may need to enter them into the central database. Some state associations do require this and also, individual affiliates are allowed to give to PAC but must be in the database to do so. Please note: this Member Type is only for individual Affiliate members. If the association's bylaws define the affiliate membership as a company, you would NOT enter a person into NRDS with the Member Type AFF.
- 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 (licensee in Realtor office who choose not to join the association and for which the broker is responsible for the non member assessment) 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.
  - Online Member Types: there are two Member Types used exclusively by the California POEs for reporting purposes to their state association. POEs can select this online at the NRDS Add a Member screen. These types do not filter up to NAR for any use as it is not a Member of NAR. The types are LFRO and MLO. California POEs would contact their state association for more information.
- 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 mean the member is dropped and no longer active. Once you do drop a member, you should use the Status I and T in the following manner:
    - I (Inactive) indicates the member left voluntarily, in good standing. They may have simply resigned or retired from the business. Inactive would also be used when the member decides not to renew their membership. When a board makes an offer of association membership renewal (sends an invoice), the member can indicate to you by the due date by the act of not paying that they have declined the offer to renew.
    - T (Terminated) indicates that the member was dropped because they did not meet any outstanding obligations. Examples from the associations of this include not paying an outstanding arbitration obligation, not meeting any ethics hearings

requirements, never taking the COE course, etc. In other words, this member did not leave as a member in good standing. (NOTE: simply choosing to not renew their Realtor membership would not fit in this category. If they have chosen not to renew, you would simply change them to Inactive. Annual Realtor dues are not a Receivables obligation. MLS policy may be different but NRDS is strictly for tracking association membership).

- 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. This status is used only every 2 years at the end of a COE Quadrennial training cycle when the members who have not take the course by December 31 would be suspended throughout January and February until March 1 at which time they are dropped (Status T) because they still did not take the course, or changed to status A because they did take the course.
- Home Address: Home Address is required in NRDS when adding a member (Member Type of Realtor and Realtor Associate. 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.
  - Special Note on Join Date and Dues Proration: If a member does not pay dues and is inactivated, if they come back in the same year their dues are not prorated and you should not change the Join Date. For example, you bill for the 2016 dues. The member does not pay the 2016 dues. You change the member's status to inactive. They return at any time in 2016 whether it is January, June, December, etc., you would not prorate their dues. They would owe the entire amount for 2016.

If you had inactivated a member and they had not paid their dues and then they come back the next year, you would change their Joined Date in NRDS and prorate their dues as a new member since they were not a member in the previous year. Example: you bill for 2016 dues. The member does not pay and you drop their membership so they were not a member at all in 2016. They return in 2017. At that point you would change their Joined Date and prorate their dues as a new member.

If a member was an active member in the previous calendar year, if you drop them for any reason in that year and they return the next year you do not change their Joined Date and you do not prorate their dues. Example: member pays 2016 dues, they remain an active R/RA member in 2016, you drop them in 2016 at any point for any reason. They return at any time in 2017 whether it is January, June, December, etc., you would not prorate their dues. They would owe the entire amount for 2017.

- **Email Address:** Email Address is required in NRDS when adding a member (Member Type of Realtor and Realtor Associate).
- **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 NAR certifications are loaded automatically into NRDS from the online course. The

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certifications loaded into NRDS are EPro, AHWD (At Home With Diversity), SFR (Short Sales Foreclosure) and BPOR (Broker Price Opinion Resource), MRP (Military Relocation Professional) and RSPS (Resort Secondary Property Specialist).

- 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**

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. Also stored in the Demographic record is the member's Education Level and Military Service.

## **COE REPORTS**

The COE Reports function creates a report so the POE can view all their active (Status A and P) members (Type R and RA) who have completed the COE requirement for renewing members in a particular cycle. There is also an option to view the active members who do not have a COE course for a particular cycle.

The COE course must be entered by POEs into the member's Education record in NRDS. If the member takes the COE course online at realtor.org, realtor.org will add that course automatically for you and inform the POE via the NRDS Daily Changes report. If the member does not take the course at realtor.org, the POE must enter the course themselves, however the member met the requirement (classroom course, by act of renewing their license, etc).

For the report to work correctly for you, you must follow the guidelines for entering the COE course number in NRDS.

The reports can be viewed online or using the Save as CSV button allows you to open the report in Excel and save. You can then sort and select how you like when working with the data. You may, for example, run the WITHOUT report as a CSV file, open in Excel, copy the Email Address column and build a group in your own email system to send out a reminder to the members who still need to take the course. You also may want to sort the report by Office ID, cut and paste, and send the broker a list of renewing members in their office who have (or have not) taken the course.

## **ONLINE MEMBER APPLICATION**

This function allows the POE to take the NAR standard Member Application and customize it via an online template for their association.

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Once the association has completed the template, the system will display URL links for their application. You must then put that link on your web site so licensees can go to that link and apply online. Once someone has submitted an application, the system will send an email to the association that you have a new application.

There are several optional features an association can use including:

One allows you the option to let the applicants pay online at the same time that they apply, using an interface into the Realtor Ecommerce Network.

You can view and print submitted applications.

You can click one button to add the applicant to NRDS as a member.

You can download the XML of all the data from an application to import into your own membership system.

Once an applicant is loaded into NRDS, you can view an archive of the completed applications and delete as needed.

## **TRAINING & SUPPORT**

- 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 Quick Takes: a library of recorded training sessions on the various NRDS functions such as Add a Member, COE reports, Transfer Member, etc.
- Ecommerce Online User Manual: the Ecommerce Manual is available online, complete with an Index, on the main Ecommerce menu. This manual contains information on all the functions in the Ecommerce system.
- Ecommerce News: published every month at the end of the month, Ecommerce News contains important announcements, deadlines, changes, helpful hints, etc. An email goes to the EPOE announcing publication. All Ecommerce News including an index to each year is available on the main Ecommerce Menu.
- Ecommerce Quick Takes: a library of recorded training sessions on the various Ecommerce functions such as setting up Invoicing, using EFT, each of the reports, etc.

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- 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](mailto:nrdshelp@realtors.org).

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