

## General Forms Portal FAQs

### **Q. How do I access the Forms Portal tools and other online forms?**

- Purchase a subscription to the [Worldwide ERC® Forms Portal](#).
- 1-Year Subscription fees:
  - \$275 for current Worldwide ERC® Members- purchase access when you join or later.
  - \$1,500 for non-members
- Forms Portal subscriptions are valid for 12 months from the date of purchase
- For accessing PDFs, you must have the most recent version of Adobe (this is for both Apple and PC users)

### **Q. What is the best way to use the PDF forms?**

- To enable all programmed features, we recommend that you save a copy locally to your computer and work within the form from there.

### **Q. What's New with the Broker's Market Analysis and Strategy (BMA) Form?**

Content enhancements delivered with the 2022 version of the BMA include:

- The new fillable PDF printing size is 8.5" x 11" compared to the previous printing size of 11" x 14".
- Updated characteristic selections across the form to reflect current industry trends and common responses not captured by the prior version;
- Consolidated subject property details such as HOA fees and special assessments and added ability to capture litigation disclosures;
- Updated menu selection options in the Subject Location, Subject Condition, and Recommended Repairs and Improvements;
- Revised Subject Condition section to remove the estimated cost per item;
- Reconfigured Market Conditions section to make it easier to capture and review key information about the subject neighborhood and the broader relevant market area;
- Ability to automatically calculate average number of sales per month and months supply of inventory;
- Revised Competing Listing and Comparable Sale sections that streamline the required questions and improve the usability and viewability of both sections;
- Reconfigured Value Analysis section to centrally capture concession-related details along with the Most Likely Sale Price (MLSP) and Suggested List Price (SLP);
- Ability to insert a subject property photo and a photo of each competing listings and comparable sales directly into the fillable PDF version and to attach it to the new online version; and
- Capability to capture digital signatures for the brokerage contact and the agent preparer.

Technology and access improvements delivered with this revision include:

- Access to two ways to complete the form - a downloadable and fillable PDF version, and an online form version that allows for generating a PDF copy once completed;
- An online guide, viewable through any device; and
- Licenses available to private firms to integrate the BMA into their own technologies.

### Online Form FAQs | Broker's Market Analysis Strategy (BMA)

#### **Q: Who is the online version of the BMA form best suited for?**

The online version of the BMA form is designed to support small volume BMA users that can either complete a single form in one sitting or can successfully manage tracking and maintaining the current version of each form when they click "Save and Resume Later."

If you regularly complete a high volume of BMA forms or are not able to successfully track and maintain the most current version of the saved form link for each form, we advise you to either utilize the Fillable PDF version of the BMA form or leverage a version of the BMA form licensed by an external software vendor.

#### **Q. How do I access the online version of the BMA form? Can I complete it using my phone?**

- The online form can be accessed anywhere you have access to the internet via a browser (Firefox, Chrome, Safari, etc.)
- The form is responsive, meaning it will resize depending on the device you are using to view it.
- To access, [login to the Worldwide ERC® Forms Portal](#), select the online BMA form and it will open in a new browser window.

#### **Q. How long do I have access to the form I completed or started to complete?**

- Your data will be saved for *30 calendar days following the initial start of filling out the form* and then permanently deleted. Users must ensure that they complete the form and save a PDF copy of the form within the 30-calendar day window.

#### **Q. Can I save the online form and come back to it later to complete?**

- Yes, *except for uploaded photos*. We recommend that all photos be uploaded right before submitting the complete form. Only text is saved if you wish to revisit it later.
- Yes, the form can be saved online and then you may revisit it using the auto-generated link provided on the screen after you click "Save and Resume Later" at the bottom of each page - you may email the link to one email address for tracking.
- **Note:** Each time the online form is saved, the system generates a NEW unique link to that saved version. Users sharing access to a particular form with multiple people must plan accordingly and ensure that they are able to maintain track of the latest version of the link.
- The online form does not autosave. **It is critical that each user utilizes the "Save and Resume Later" button at the bottom of each page and maintain track of the most recent link URL for each form they are completing.**

**Q. Can I print and save the form?**

- You can print and/or save the form once it has been fully completed. The final version is provided to you in PDF format.

**Q. Can I edit the PDF that is produced by the online form?**

- Yes! You can edit the PDF just like any other PDF by using Adobe Acrobat, Word, PDF editors, etc.

**Q. I have multiple team members who need to complete different sections of the BMA. Can we all work on the form at the same time?**

- The online form can be shared with multiple people to contribute data if there is a predetermined workflow of who completes sections in a consecutive manner. In other words: Only one person at a time should input data into the form and work together to plan who is first, second, third etc.
- *Example workflow and tasks:*
  - Project lead assigns specific areas/data to be collected and input into the form
  - Assigns which person completes their section first, second, third.
  - First person completes their section, saves the form, and receives a link to send to the next person to continue completing the form and so on.
- **Important note:** This is NOT a collaborative document that can be completed by multiple people at the same time.

**Q. What if I lose my link- how do I retrieve my work?**

- The only method for users to access a form in progress once they start filling it out is via the most recent version of the Saved form link generated by the system once a user clicks “Save and Resume Later.” If a user does not maintain the most recent version of the form generated after hitting the Save button or does not complete the form and generate and save a PDF version of the form, they will not be able to return and access the form.

Worldwide ERC will not be able to assist any user that does not accurately keep track of the links to each form.

**Q. How secure is the data inserted into this form?**

- The BMA is built in [Formstack](#), which provides multiple layers of data protection through encryption and current data security tools. This technology is housed in the United States via Amazon Web Services (AWS), which meets verified SOC standards.

**PDF FORM FAQs | Broker’s Market Analysis and Strategy (BMA)****Q. Can I download and save the form? Can I use it as many times as I need?**

- Yes! You may download the form to your device and save copies just like any other PDF.
- Your license to use any of the Worldwide ERC® Forms Portal resources is granted for one calendar year from your date of purchase.