

## Association Membership Processing for Agents:

- 1. Confirm Agent Status is Current-Active with DBPR
- 2. Agent's license is linked to Broker's DBPR account
- 3. Process New Member Application with Association at [Rworld.com/join](http://Rworld.com/join)

## Processing Transfers:

- 1. If agent is transferring from another association, submit Association Transfer Form online at [Rworld.com/transfer](http://Rworld.com/transfer)
- 2. If agent is already with association:
  - a. Confirm Agent is Current-Active with DBPR
  - b. Agent's license is linked to Broker's DBPR account
- 3. Transfer listings from prior brokerage if applicable (Listing Release Form available on Broker Landing Page)
- 4. Agent transfer Supra with Association

## Association Educational Requirements:

- 1. Agent registered for Association New Member Orientation
- 2. Agent registered for 2CE Keep It Legal & Keep Your Commissions (counts as MLS Compliance requirement)
- 3. Agent registered for 3CE Ethics & Business Practices (if agent has taken with another association for current period, they can forward their certificate to [Education@RWorld.com](mailto:Education@RWorld.com) for our recording.

## Association Educational Recommendations: (Live classes available to register from MyRealtorDash, recorded sessions available at [Rworld.com/webinars](http://Rworld.com/webinars))

- 1. My Realtor Dash Tour
- 2. MLS Courses (Flex or Matrix, whichever agent/broker has requested)
- 3. Transaction Desk or Form Simplicity (for contracts and e-sign if Brokerage does not have another required product)

## Internal Office Status Change Checklist:

- 1. Add Agent to any internal interfaces/websites
- 2. Send Agent Leaving email to appropriate board
- 3. Verify Agent email is created and is added to any appropriated Distribution Lists
- Add SS/Tax ID is added to any appropriated accounting programs

## New Agent Checklist:

- Schedule office orientation tour and provide office resources info (office printer/copier/scanner/phone equipment, IT support, etc. and obtain necessary codes)
- Order business cards and name badge
- Order Signage and any other applicable marketing materials
- Update voicemail greeting on mobile phone to reflect new brokerage
- Create E-Signature to reflect new Brokerage with any Broker Requirements
- Create/update social media accounts/profiles
- Familiarize agent with Association resources/support classes
- Show agent where to access DO NOT CALL registries
- Review necessary file submission policies to avoid delays in commissions and avoid fines
- Receive office entry codes/keys
- Log into file system (if applicable and review tutorials to become familiar with system.
- Log into Brokerage website to upload business photo and update personal information (if applicable)
- Log into E-Sign program and watch tutorials on how to use the system (if applicable)
- Verify email address to receive brokerage weekly email newsletters, office communications, 1099 tax documents
- Verify DBPR has all current information, address, phone and email address
- Verify Association has all current information, address, phone and email address
- Verify NAR has all current information, address, phone and email address
- Review all necessary office policies (inclusive of social media policies)
- Program the following numbers into your phone:
  - Florida Realtors Tech Helpline (407) 587-1450
  - Florida Realtors Legal Hotline (407) 438-1409
  - Broward, Palm Beaches & St. Lucie Realtors (561) 585-4544
- Commit to annual RPAC (Realtor Political Action Committee) contribution
- Google name online and update Brokerage Name on appropriated sites, confirm updated email address, phone, address