



HOW TO USE AN RPI FORM

Filling out a form

To enter text, position the cursor inside a form field and **click** your mouse button. This activates the form field and allows text entry.

To select or deselect a check box, click on it with your cursor or press **Enter** when the check box is activated.

To accept your text entry or check box:

- advance to the next form field by pressing the **Tab** key on your keyboard;
- return to the previous form field by pressing the **Shift + Tab** keys on your keyboard;
- prevent further entry in the current form field by pressing the **Enter** key on your keyboard.

To delete your entries in the form field, press the **Backspace** key on your keyboard.

[\[Go to the Numerical Index\]](#)

Personalizing a form

Forms which are used in the solicitation of a new client allow personalization. To add your picture or company logo to a form, **click** the image field containing an icon of a house in the upper left cover of the form.

Select an image file from your computer and click **Select**.

Saving a form

Go to File > Save As.

Note: **Save As** saves all changes to a separate copy of the form in a user-specified location, leaving a blank copy of the original form for future use.

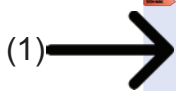
Inserting digital signatures into your form

To sign a form digitally, (1) click the **Signature Field** you want to sign.

I agree to the terms stated above.

Date: _____, 20____.

Client: _____

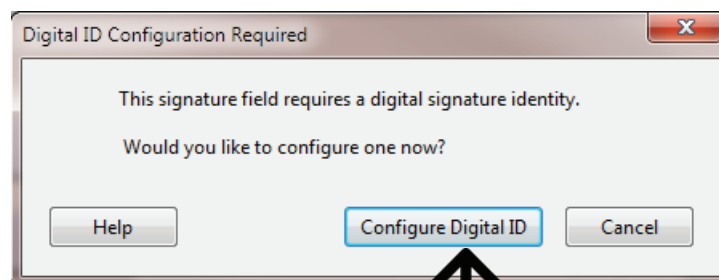


Signature: _____

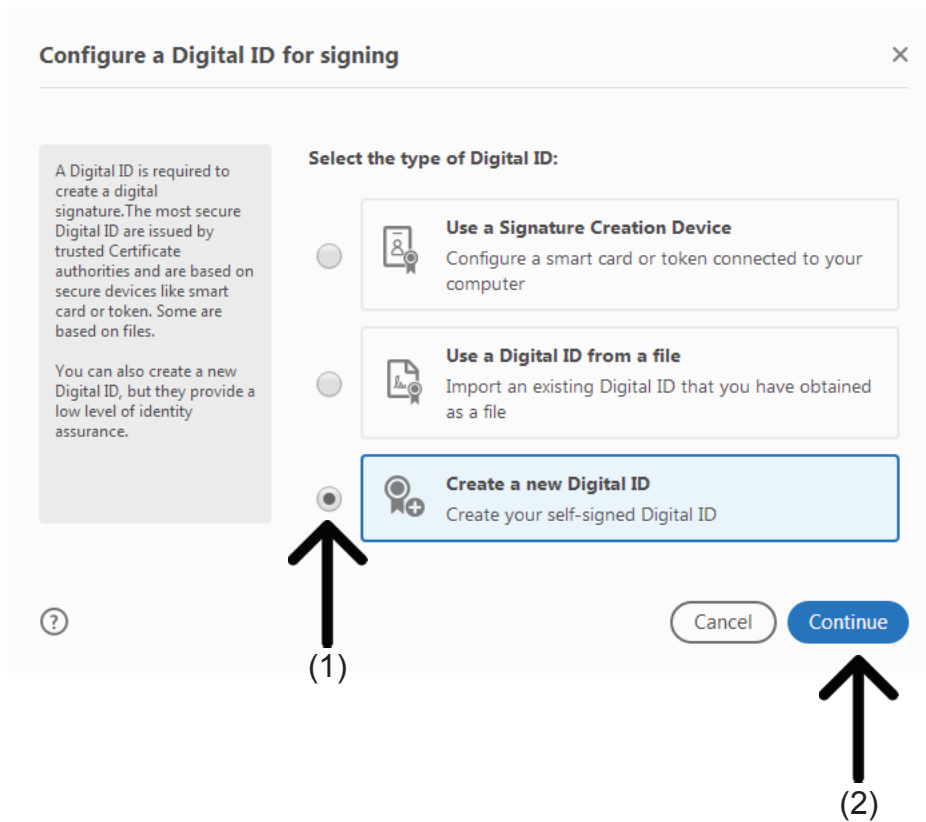
Client: _____

Signature: _____

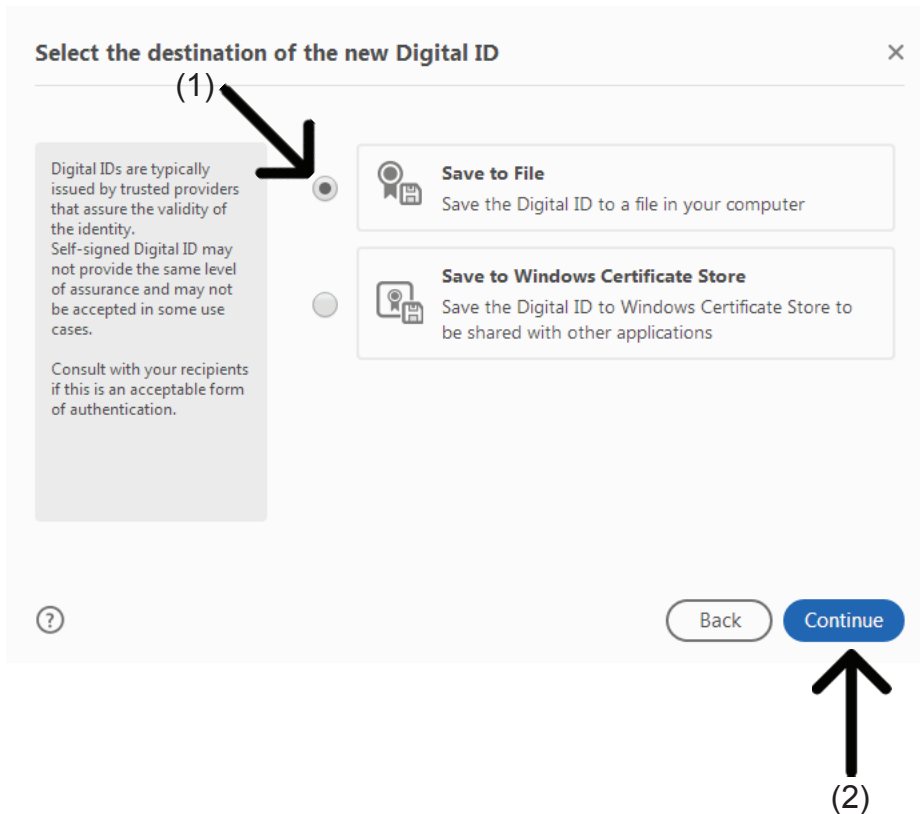
If this is your first time digitally signing a form and you have not yet created a digital ID, select (1) "Configure Digital ID".



Select (1) “Create a new Digital ID” to create a new, password protected digital ID. (2) Click **Continue**. This digital ID can be used on all **RPI** forms.



Select (1) “Save to File” to select the destination of the new Digital ID. (2) Click **Continue**.



(1) Enter your identifying information to appear on your digital signature then (2) click **Continue**.

Note: Leave “Key Algorithm” and “Use digital ID for” fields set to default unless you have nonstandard specifications.

(1)

Enter the identity information to be used for creating the self-signed Digital ID.

Digital IDs that are self-signed by individuals do not provide the assurance that the identity information is valid. For this reason they may not be accepted in some use cases.

Name

Organizational Unit

Organization Name

Email Address

Country/Region

Key Algorithm

Use Digital ID for

Back Continue (2)

(1) Leave the save location for your digital ID at its default setting or enter a new location. (2) Enter and confirm your password. (3) Click **Finish**.

Save the self-signed Digital ID to a file

Add a password to protect the private key of the Digital ID. You will need this password again to use the Digital ID for signing.

Save the Digital ID file in a known location so that you can copy or backup it.

Your Digital ID will be saved at the following location :

Browse (1)

Apply a password to protect the Digital ID:

Confirm the password:

Back Save (3)

(2)

(1) Click **Continue**.

Sign with a Digital ID [X]

Choose the Digital ID that you want to use for signing: [Refresh]

student (Digital ID file)
Issued by:student ,Expires: 2021.10.21 [View Details]

[?] [Configure New Digital ID] [Cancel] [Continue] ← (1)

To enter your digital signature, (1) enter your password and (2) click **Sign**.

This will create a separate copy of the filled-in form bearing your digital signature. Specify the name of the saved form and location where you'd like to store it.

Note: Once you sign a form it becomes locked, preventing any additional modification by any of the parties with the exception of adding additional digital signatures.

Sign as "student" [X]

Appearance [Standard Text] [Create]

student Digitally signed by student
Date: 2016.10.21 08:57:01 -07'00'

Lock document after signing [View Certificate Details]

Document warnings have been reviewed [Review]

(1) [Enter the Digital ID PIN or Password...] [Back] [Sign] ← (2)

If another party is to digitally sign the same form, **email the saved copy** containing your digital signature to the recipient for their signature. Anyone entering a digital signature will need to create their **own digital ID** by following the steps above.

Note: Multiple parties cannot digitally sign the same form at the same time. Multiple signors must sign individually, emailing the most recent version of the form back to the transaction broker or agent to forward to the next party to sign.

I agree to the terms stated above.

Date: _____, 20____.

Client: _____

student
Digitally signed
by student
Date: 2016.10.21
08:58:29 -07'00'

Signature: _____

Client: _____

Signature: _____

Printing a filled-out form

To bring up the print options, go to File > Print or click the **Print** icon.

Specify the printer, page range, number of copies, and other properties, and click **OK**.

Increasing or decreasing the page view

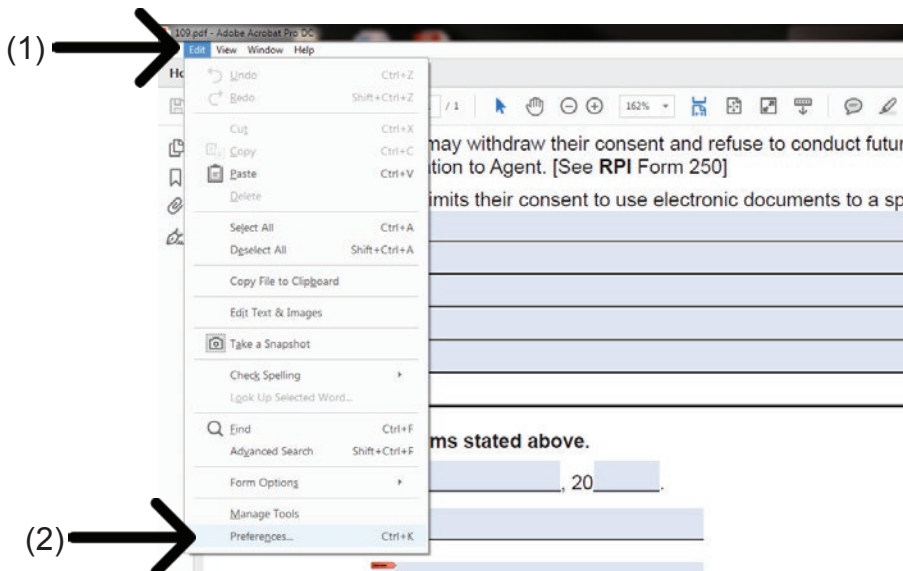
To increase the page view, hold down the **Ctrl key** and press the “+” key on your keyboard until you have reached the desired page viewing size.

To decrease the page view, hold down the **Ctrl key** and press the “-” key on your keyboard until you have reached the desired page viewing size.

Enabling Auto-complete

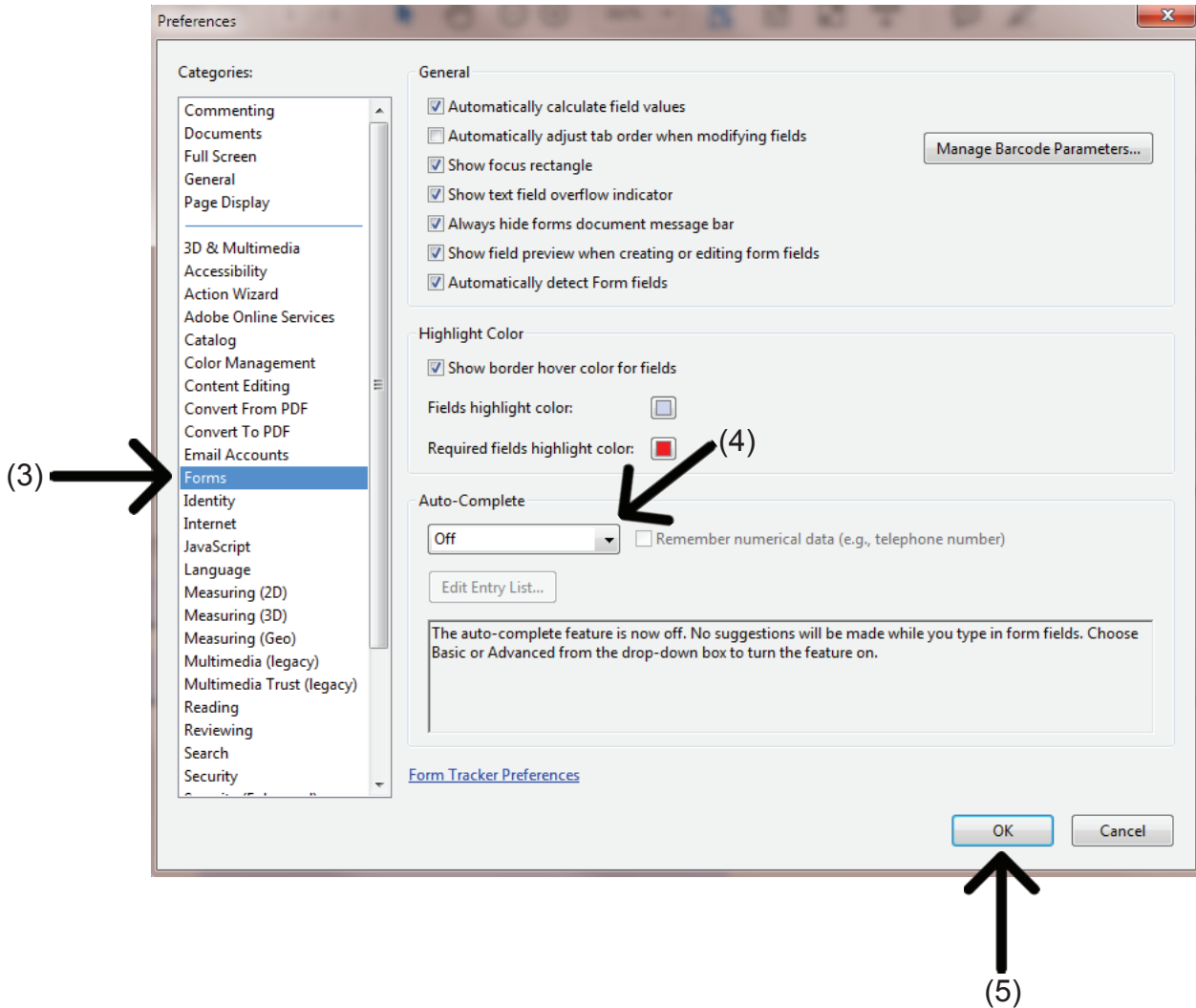
Note: The **auto-complete** feature uses previous form field entries to generate relevant choices as you type into a new field, saving you from entering the same information multiple times.

With the form open, select (1) Edit from the top left menu options. Within this drop down list, (2) click on **Preferences**.



Select (3) Forms from the column on the left.

Locate(4) Auto-Complete & Select Advanced or Basic. (5) Click **OK**.



Using the search feature

Searching one individual form:

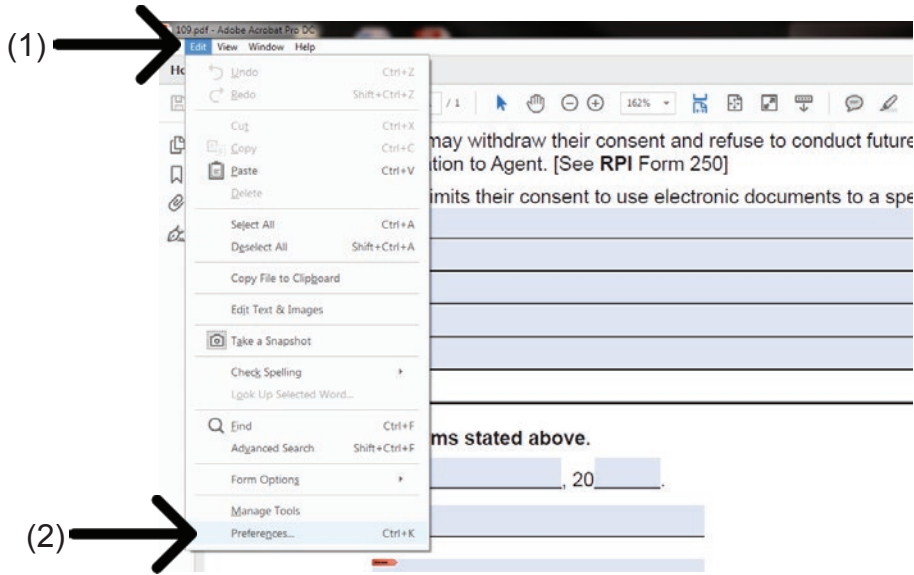
Open the document you want to search.

Go to *Edit > Find*.

Type the word, words, or part of the word you are searching for and press Enter.

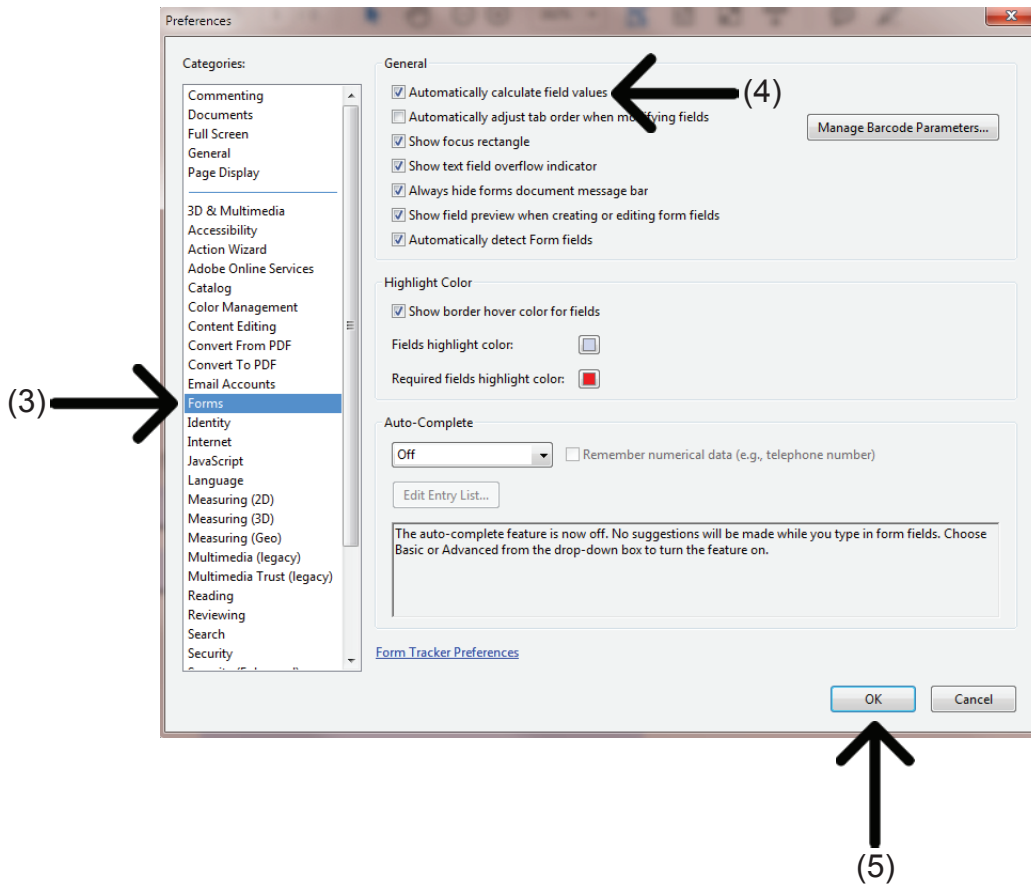
Turning off automatic calculations

With the form open, select (1) Edit from the top left menu options. Within this drop down list, (2) click on Preferences.



Select (3) Forms from the column of buttons on the left.

Deselect (4) Automatically calculate field values. (5) Click OK.



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- 102-1** Seller's Listing Agreement – Exclusive Right to Sell, Exchange or Option – With Shortsale Contingency
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- 474-7** Notice of Trustee’s Sale – Summary of Key Information (Vietnamese)
- 474-8** Notice of Postponement of Trustee’s Sale (Calif. Civil Code §2924(a)(2)(5))
- 475** Trustee’s Deed Upon Sale
- 478** Proof of Service – For Service of Notice of Default
- 479** Notice of Surplus Funds From Trustee’s Sale

Office Management and Supervision Forms 500 - 548-1

- 500** Agent Interview Sheet
- 501** Agent Identification and Contact Information
- 502** Agent Itinerary and Schedule
- 504** Agent's Income Data Sheet
- 505** Broker-Agent Employee Agreement
- 506** Independent Contractor Employment Agreement — For Sales Agents and Broker Associates
- 507** Assistant Employment Agreement — Unlicensed Administrative Assistant
- 508** Office Agents' Licensing Record
- 509** Salesperson Change Application (CalBRE 214)
- 510** Office Manager Employment Agreement
- 511** Designated Officer Employment Agreement
- 519** Affiliated Business Arrangement Disclosure Statement – Residential Broker (Regulation X (RESPA); 24 CFR §3500.51)
- 520** File Activity Sheet
- 521** Transaction Coordination Sheet (Seller's Agent) – Property Listing Through Expiration or COE
- 521-1** Transaction Coordination Sheet (Buyer's Agent) – Prospective Purchase Through COE
- 521-2** Transmittal and Request Memo – Transaction Coordinator
- 522** Listing Information Report – For Broker's Administrative Use
- 522-1** Expired Listing Report – Or By Cancellation
- 523** Property Sold Report – Administrative and Fee Information
- 523-1** Transmittal and Stack Sheet on Sale – For Administrative File Review
- 524** Disbursement of Brokerage Fees – Broker Instructions to Escrow
- 525** Confirmation Memorandum
- 526** Settlement Agreement – With Release and Waiver
- 527** Conflict of Interest Disclosure — Kinship, Position or Undue Influence
- 535** Interest-Bearing Trust Account Agreement
- 536** Record of All Trust Funds Received – Not Placed in Broker's Trust Account (Includes Notes and Uncashed Checks Taken as a Deposit) (CalBRE 4524)
- 542** Threshold Notification (CalBRE 853)
- 543** Trust Fund Non-Accountability Report (CalBRE 854)
- 544** Trust Fund Status Report (CalBRE 855)
- 544-1** Trust Fund Bank Account Reconciliation (CalBRE 856)
- 545** Multi-Lender Transaction Notice (CalBRE 860)
- 546** Trust Account Report Multi-Lender Transactions (CalBRE 852)
- 547** Mortgage Loan/Trust Deed Annual Report (CalBRE 881)
- 548** Sample Trust Account Review (TAR) Report – Sample One
- 548-1** Sample Trust Account Review (TAR) Report – Sample Two

Landlord and Tenant Forms 550 - 598

- 550** Residential Lease Agreement
- 550-1** Addendum – Lease/Rental Agreement
- 551** Residential Rental Agreement – Month-to-Month
- 552** Commercial Lease Agreement – Gross – Single Tenant
- 552-1** Commercial Lease Agreement – Gross – Multi-Tenant
- 552-2** Commercial Lease Agreement – Net – Single Tenant
- 552-3** Commercial Lease Agreement – Net – Multi-Tenant
- 552-4** Commercial Lease Agreement – Percentage Lease
- 552-5** Commercial Rental Agreement – Month-to-Month Tenancy
- 552-6** Commercial Lease Agreement Addendum – Maintenance Modification
- 552-7** Commercial Lease Agreement Addendum – Alienation of Leasehold
- 552-8** Commercial Lease Agreement Addendum – Lender Subordination and
Attornment Provisions
- 553** Application to Rent
- 553-1** Guarantee Agreement – For Rental or Lease Agreement
- 553-2** Denial of Credit Due to Derogatory Credit Report (Calif. Civil Code §1785.20; 12 Code of
Federal Regulations §202.9; 15 USC §1681m)
- 554** Change of Owner or Property Manager – Addendum to Rental or Lease Agreement
- 555** Tenant Lease Worksheet
- 556** Offer to Lease
- 557** Lead-Based Paint Disclosure – For Renting or Leasing Residential Property
- 558** Partial Payment Agreement – Commercial
- 559** Partial Payment Agreement – Residential
- 560** Condition of Premises Addendum
- 561** Condition of Furnishings Addendum and Inventory
- 562** Tenant's Property Expense Profile
- 563** Pet Addendum
- 563-1** Non-Smoking Addendum
- 564** Waterbed Addendum
- 565** Option to Renew/Extend Lease
- 566** Exercise of Option to Renew/Extend Lease
- 567** Notice of Intent to Enter Dwelling
- 567-1** Notice of Right to Request a Joint Pre-Expiration Inspection/ Request for Joint
Pre-Expiration Inspection
- 567-2** 48-Hour Notice of Intent to Enter Dwelling – Pre-Termination Inspection
- 567-3** Statement of Deficiencies on Joint Pre-Expiration Inspection
- 568** Notice of Charges Due – Other than Monthly Rent Payment
- 569** 30-Day Notice to Vacate – For Use by Residential Landlord
- 569-1** 60-Day Notice to Vacate – For Use by Residential Landlord
- 570** 30-Day Notice of Change in Rental Terms
- 571** 30-Day Notice to Vacate – From Commercial Landlord
- 572** 30-Day Notice to Vacate – From Tenant
- 573** 90-Day Notice to Quit Due to Foreclosure – To Holdover Residential Tenant
- 573-1** Cover Letter for Notice to Quit Due to Foreclosure – To Holdover Residential Tenant
Vacating in Less Than 90 Days

- 574** 60-Day Notice of Change in Rental Terms
- 575** Three-Day Notice to Pay Rent or Quit – With Rent-Related Fees
- 575-1** Three-Day Notice to Pay Rent or Quit – Without Related Fees
- 576** Three-Day Notice to Perform or Quit
- 577** Three-Day Notice to Quit – Residential and Commercial
- 578** Three-Day Notice to Quit Due to Foreclosure – To Holdover Owner or Commercial Tenant
- 579** Right of First Refusal to Buy – Addendum
- 579-1** Right of First Refusal to Lease Space — Lease Addendum
- 579-2** Notice of Decision to Sell Property or Lease Additional Space – For Right of First Refusal
- 580** Proof of Service – For Service of Notice to Real Estate Tenants
- 581** Notice of Belief of Abandonment – Residential or Commercial Property
- 582** Notice to Landlord to Surrender Personal Property – For Use by Residential Tenants Only
- 582-1** Costs Payable to Reclaim Personal Property
- 583** Notice of Right to Reclaim Personal Property – To Commercial Tenant After Termination of Tenancy
- 583-1** Notice of Right to Reclaim Personal Property – To Others with an Interest in Property Left by Commercial Tenant
- 584** Notice of Right to Reclaim Personal Property – To Residential Tenant After Termination of Tenancy
- 584-1** Notice of Right to Reclaim Personal Property – To Others with an Interest in Property Left by Residential Tenant
- 585** Security Deposit Disposition – On Vacating Residential Premises
- 586** Disposition of Deposit on Sale of Tenant-Occupied Premises
- 587** Termination of Lease and Surrender Agreement
- 588** Notice of Temporary Displacement
- 590** Property Management Agreement
- 590-1** Request for Verification of Insurance – Property Management
- 590-2** Termination of Property Management Agreement
- 591** Resident Manager Agreement
- 592** Vacation Rental Management Agreement
- 593** Guest Occupancy Agreement – For Transient Occupancy Properties
- 594** Confirmation of Reservation – Transient Occupancies
- 595** Assignment of Lease – By Landlord/Lessor
- 596** Assignment of Lease – By Tenant/Lessee
- 597** Notice of Nonresponsibility – From Landlord (Calif. Civil Code §8444)
- 598** Tenant Estoppel Certificate