

ELECTRONIC FORM INFORMATION

RE 695 (Rev. 6/98)

Who May Apply

Anyone may request the Bureau of Real Estate's (CalBRE) approval of Subdivision forms re-created electronically prior to their use. The forms must meet the minimum criteria for form design and content. Once approved, the forms may be included in public report applications and will be considered in compliance with Commissioner's Regulation 2790.

Form Design Criteria

- The electronic form, once printed, must duplicate the CalBRE form as close as possible in font, point size and formatting.

CalBRE generally uses 10- or 11-point Times for text (10-point minimum). Captions (titles) for fill-in boxes are 6-point all-cap Helvetica.
- The first page of an application form (RE 624, 628, 658, 635, 603, 668A, 635C) must be identical to the CalBRE form. The information on the first page is used to enter data in CalBRE's computer system.
- Form content and question numbering must be identical to the CalBRE form being replicated.
- Proposed forms must either contain the word "REPLY:" preceding the location where a narrative reply is to be inserted (represented by blank lines on CalBRE forms), or the reply must be in a different font and/or point size, bolded or underscored, as long as the text is easily readable and is no smaller than 10-points. Do not print replies in italics.
- Insert "Page __ of __" at either the top or bottom of each page, right or left side only. The total number of pages may differ from the CalBRE form being replicated.
- Include the following language under the "Certification" paragraph preceding the applicant's signature on all forms which contain a certification:

"The undersigned certifies that this electronic re-creation of Bureau of Real Estate form RE ____ is identical in content and question numbers as the CalBRE approved form ID ____."

Approval Process

CalBRE will review the proposed form and, once approved, will return a copy stamped "Approved" with date, initials and an identification number. If the form is not acceptable, the applicant will be notified of the required changes in order to receive approval.

A cover letter will be sent to the applicant, along with the approved form. The assigned identification number will contain 12 digits indicating the form number (first four digits) revision date (next four digits) and a sequence code (last four digits), for example 624001970001. Please note that approvals are applied to the form submitted, not to the applicant requesting the approval; therefore, an approved electronic re-creation of a CalBRE form may be used by anyone as long as the applicable identification number is included on the form when submitted to the Bureau.

How to Use Approved Forms

- The CalBRE 12-digit identification number is to be inserted on the same line immediately following the CalBRE form number and revision date included in the form header at the top of the first page, on each subsequent page either in the header or footer, and in the certification paragraph.
- The use of approved forms is no different than using CalBRE forms. Simply complete the form and submit a printed copy with original signatures along with CalBRE submissions.
- As CalBRE forms are revised, it will be necessary to submit updated forms for re-approval and issuance of a new identification number. Form revisions will be accepted through written requests accompanied by two copies of the printed form. Changes should be highlighted.
- For up to 90 days following the CalBRE revision date of a form, CalBRE will accept previously approved versions of the same form. After 90 days has elapsed, it will be necessary to include all the current information in the electronic form.

How To Apply

All requests for electronic form approval must be submitted in writing along with two paper copies of each proposed form to:

Mailing/delivery address:

Bureau of Real Estate
Subdivisions North Office
1651 Exposition Blvd., Sacramento, CA 95815
P.O. Box 137005
Sacramento, CA 95813-7005

Telephone number:

(916) 263-8929

Budget Forms (RE 623, 624A, 611A)**See reverse side for information.**

Alternative Approval Method for Budget Forms RE 623, 624A, and 611A Only

Budget forms may be electronically re-created and approved in accordance with the design criteria as set forth on the front page of this form. That type of approval would result in a form that could not be modified from the CalBRE form. However, anyone would be allowed to submit a budget based on that type of approval.

Realizing that complex projects can involve numerous special budget categories as well as unique subsequent phase components, it is important to provide budget preparers with sufficient flexibility to account for all of the aspects of the project. The electronic form qualification process set forth below provides approval for the use by a particular budget preparer (individual or company) of a form which includes basic budget information. Once approval is granted, the budget preparer may include additional information than what is contained in the approved form without further CalBRE approval. Thus, the CalBRE will always receive the basic budget information as well as whatever additional information is necessary to properly fulfill the assessment needs for specific projects.

Who May Apply

Anyone may request the Bureau of Real Estate's (CalBRE) approval of Subdivision forms re-created electronically prior to their use. The forms must meet the minimum criteria for form design and content. Once approved, the forms may be included in public report applications and will be considered in compliance with Commissioner's Regulation 2790.

The following criteria applies only to approvals to use electronically re-created Budget Worksheet (RE 623), Common Facilities to be Owned or Controlled by Homeowners Association (RE 624A), and Planned Construction Statement (RE 611A). Refer to front page for design criteria applicable to all other subdivision forms.

Form Design Criteria

Note: CalBRE generally uses 10- or 11-point Times for text (10-point minimum). Captions (titles) for fill-in boxes are 6-point all-cap Helvetica.

- The electronic form, once printed, must include, but is not limited to, the same information as contained in the CalBRE form being replicated.
- Insert "Page __ of __" at either the top or bottom of each page, right or left side only. The total number of pages may differ from the CalBRE form being replicated.
- Include the following language either under the "Certification" paragraph preceding the applicant's signature on all forms which contain a certification or as a separate statement along with a signature either at the beginning or end of the form:

"The undersigned certifies that this electronic re-creation of Bureau of Real Estate form RE ____ contains at least the same information as the

CalBRE approved form ID _____."

Approval Process

CalBRE will review the proposed form and, once approved, will return a copy stamped "Approved" with date, initials and an identification number. If the form is not acceptable, the applicant will be notified of the required changes in order to receive approval.

A cover letter will be sent to the applicant, along with the approved form. The assigned identification number will contain 12 digits indicating the form number (first four digits) revision date (next four digits) and a sequence code with letter identifier (last four digits), for example 62300996B001. Please note that approvals for budget forms are applied to the form as well as the entity requesting the approval; therefore, *an approved electronic re-creation of a CalBRE budget form may be used only by the approved entity.*

How to Use Approved Forms

- The CalBRE 12-digit identification number is to be inserted on the same line immediately following the CalBRE form number and revision date included in the form header at the top of the first page, on each subsequent page either in the header or footer, and in the certification paragraph.
- The use of approved forms is no different than using CalBRE forms. Simply complete the form and submit a printed copy with original signatures along with CalBRE submissions.
- As CalBRE budget forms are revised, it will be necessary to include the revised material in the electronic version and submit for re-approval and issuance of a new identification number. Form revisions will be accepted through written requests accompanied by two copies of the printed form. Changes should be highlighted.
- For up to 90 days following the CalBRE revision date of a form, CalBRE will accept previously approved versions of the same form. After 90 days has elapsed, it will be necessary to include all the current information in the electronic form.

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