

Matrix 360 Public Record Search and Realist Tax

All properties used have been selected at random for Training Purposes Only.

What is Realist Tax?

CoreLogic powers and manages the data found in Realist Tax. All 100 counties in NC and some of the bordering counties in VA have contracts with CoreLogic that allows integration of Public Recorded information into the Matrix system. Each county determines what public records can be shared and when CoreLogic can access the county data to update their Realist Tax system. (Example of use is found later in this User Guide).

What is Matrix 360?

The 360 product integrates publicly recorded information from Realist directly into the Matrix™ system. On every property submitted into the Triad MLS system, when you open a report by clicking the MLS #, the default view is the “360 Property View”. This “view” includes: Class Example MLS #1133107

- Listing: The Agent Full report contains all data supplied by the listing firm.
- Tax: Tax information provided by the CoreLogic Realist system. Counties in NC allow CoreLogic to update their publicly recorded information according to the contract each county has with CoreLogic. To view the dates the tax data has been updated on each property use the “Data Currency” link.
- Photos: full photo gallery
- History: Listing History from MLS; Sales History from Public Record; Mortgage History from Public Record.
- Parcel Map: 3 views of Google Maps with CoreLogic overlays (see Parcel Disclaimers in each Map). Parcel identification according to placement of Lat and Long by the listing agent. CoreLogic boundary overlays are available in the large Map, as well as the ability to “walk the block” – click any parcel to identify property owner, tax and MLS information.
- Flood Map: CoreLogic Flood Zon information updated from FEMA maps. See CoreLogic disclosure below the Map View.
- Foreclosure: only available if a Substitute Trustee Deed has been recorded within the past 12 months.
- AVM: CoreLogic’s Automatic Value NOTE: use cautiously and read carefully CoreLogic disclosure.

VIEW COMPARABLE PROPERTIES

NOTE: detailed training offered in the Finding Comparable Data class.

- Available when viewing current listings in Matrix, or any property that has been submitted into the Triad MLS system back to 1996.
- Click on View Comparables
- CoreLogic’s Realist Tax system and merged Triad MLS data to find POTENTIAL comparable properties.
 - Information Columns can be moved (click/drag/drop), they can be removed, and column added. In this example click in the header Status space, Insert Year Built.

- The Status column identifies if the last sale transaction was a Triad MLS sale or a Non-MLS Sale (Triad MLS). NOTE: MLS Number – last sale transactions identified as non-MLS may have an MLS number in the MLS Column. This means that that property was previously listed in the Triad MLS system.
- NOTE: NOT all properties (if any) will be good comparables for the subject. Agents using this tool must carefully evaluate which properties should NOT be included in this default search. Check those and use REMOVED Selected, the OK.
- To view the search data used by Corelogic and modify the search use.
- Modify criteria for example:
 - Change Zip Code
 - Add Property Sub Type
 - Change Current Status Change Date to 180+
 - Change Bedrooms
 - Change SqFt Living
 - Remove value in Acres.
 - Year Built put a range that is most like the subject.
- Select properties to include in the CMA report.
- Use ADD SELECTED
- Reports available (see screen shot right)

[Find more Comparables](#)

 Comparables Report

Subject Property: **4202 Oak Hollow Drive**

Selected Pages: ▼ CMA Brief; CMA Map

 Back to Results

 Create CMA

 Email

 View Report

Previous

Next

1 - 6 of 6

Checked 0

All

None

☐	Distance	Address	Status
	0.0 mi	4202 Oak Hollow Drive, High Point, North Carolin	
	1.5 mi	1706 Scarborough Road, High Point NC 27265	Closed
	0.5 mi	4514 Oak Hollow Drive #D, High Point NC 27265	Active
	1.8 mi	2306 Leeds Avenue, High Point NC 27265	Closed
	0.8 mi	3929 Deerfield Street, High Point NC 27265	Closed
	0.6 mi	4021 Baywater Point, High Point NC 27265	Active
	0.8 mi	3405 Ashfield Court, High Point NC 27265	Closed

What is Matrix 360 Public Record Search?

Matrix 360 Public Record Search allows members to perform Public Record searches within Matrix. From this Public Record search, subscribers can identify property owners in the counties identified on the Triad MLS Matrix 360 Coverage area (see below), view the publicly recorded sales history and mortgage history, identify potentially distressed properties.

Triad MLS Matrix 360 Coverage

VA Counties: Carroll, Danville, Franklin, Grayson, Henry, Patrick, Pittsylvania



Disclosure: Corelogic (software provider) has a contract with all 100 counties in NC. Each county allows Corelogic to update their publicly recorded information at different times. Some counties allow updating monthly, while others may be sporadic.

Subdivision Name Search Tips: Tax Departments recording of ownership information within recorded subdivisions typically include the specific naming that is found on the deed, i.e. in Guilford County the legal description on deeds for this subdivision: Reserve/Richland Crk Ph 03. In Realist Tax using the Subdivision search field the “select from list” must be used.

Matrix 360 Public Record Search

Realist Tax	Add/Edit	Market Reports	Re
Realist Tax System			
Matrix 360 Public Record Search			

Mailing Labels Examples

Within recorded Subdivisions

- **Matrix 360 Public Record Search** – **must ADD the search field “Subdivision”**. This data field is searching for the Realist Tax information not our MLS data. The Realist Tax Subdivision data field information is matching exactly what in Public Record, i.e., what is on the recorded deeds.
- **Be sure to select the county first** – there are many counties in the Triad that have the same named subdivisions.
- **Then add the city or zip code** – there are some counties that have the same named subdivisions, i.e., Randolph County Robins Nest in Archdale and one in Asheboro.

Example One: Locate *all property owners* in recorded subdivision: Davidson County and Forsyth County, City of Clemmons, Subdivision Salem Glen

Without using the * Wildcard the matching results = 2

Using the * Wildcard before and after **results = 199**

 Clear 2 matches  Map  Results	 Clear 199 matches  Map  Results
 Additional Fields Add/Remove	 Additional Fields Add/Remove
Subdivision salem glen ?	Subdivision *salem glen* ?

Results Information

The Display Results can be increased to 50 per page. Columns of data can be added, removed, and relocated just like listing results in Matrix. Use the Gear Icon to set your customized Tax Grid as your Default Report.

The S Column is the MLS Status indicators. This column can be sorted by clicking on “S”.

Balloons:

NO Balloon – property has not been listed in Triad MLS in recent years (NOTE: MLS listing history goes back to 1996)

Green – Active Listing in Matrix (consider whether you want to include Active listings when you are soliciting business)

Yellow – Under Contract Listing (consider whether you want to include Active listings when you are soliciting business)

Blue – Withdrawn Listing (at some point)

Purple – Expired Listing (at some point)

RED – last sale transaction property in Triad MLS.

Mailing Labels for Print or Export

- Export: With properties selected use the Action item at the bottom of the screen “Export”. You are allowed to Export 5000 addresses per 30 days. **For assistance with exporting data from Matrix email helpdesk@triadmls.com.**
- Printing Label: To print on peel and stick label purchase labels with the number 5160. Labels in 360 will only center on 5160 labels. With properties selected use the Action item at the bottom of the screen “Print”. Select the desired label type. ***NOTE: strongly encouraged to select Owner Name Tax Address if you want the mailing to be sent to the actual property owner.***

Street Name(s) Searches

When using this function, be sure to include as much location information as possible. Remember there can be more than one named street even within specific zip codes.

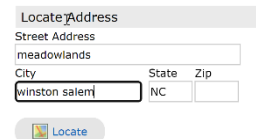
- Street Name: Maplewood,Fairway(no spacing)
- County: Forsyth
- City: Winston Salem
- Zip: 27103

Map Search Examples

Identifying area(s) using any of the [Map Search](#) drawing tools.

Identify specific sections of Meadowlands in Davidson County

- Click [Map Search](#)
- Locate Address: a street name (Meadowlands) the City (Winston Salem) include the State (NC)
- Click - Locate
- Using either the Map or Satellite view – zoom in or out as needed, move the map location by click/drag/drop.
- Using any of the drawing tools needed identified the specific sections of Meadowlands to include.



SAVE 360 Public Record Searches

To archive 360 searches for future use follow these steps.

1. Results screen, bottom right click Save
2. Click New Saved Search
3. Name the Search. Example: Meadowlands Marketing
4. SAVE
5. To retrieve this search under My Matrix select Saved Searches. Then the named search.
6. Click Results (each time the results are view the system updates property owner names according to the most recent County update with Corelogic.)

Locate Property Owners based on Tax Search Criteria and Map Location

Locate all property owners who purchased 4 + Bedrooms, 3 + Baths, 3000 + square foot homes before 12/31/2019 within 1 mile of Walburg Elementary School.

Tax Search

Ownership

Owner Last Name
Owner First Name
Owner Occupied
Foreclosure Indicator
☐ Actively in Foreclosure

Location

House # Direction Street
City
APN / Tax ID
Commercial Building Name

Map Search: Use this Map Search link to enter the search area.

Transaction Activity

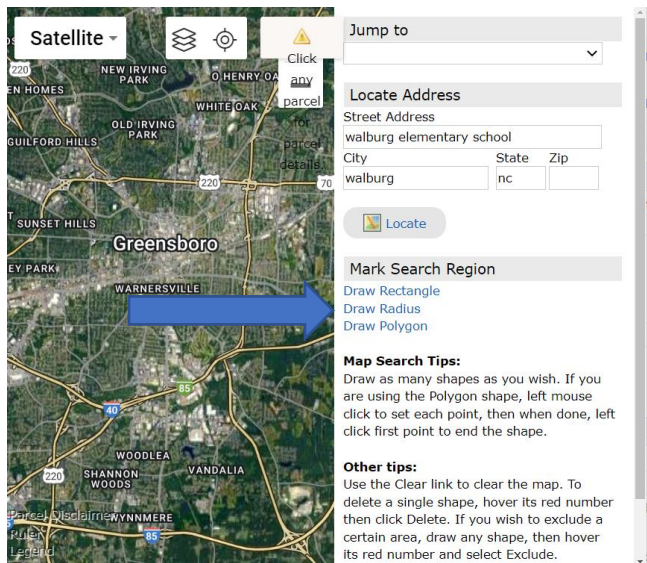
Last Sale Date (Tax Data)
12/31/2019-
Last Sale Price (Tax Data)
☒ (000s)
Seller Name

Characteristics

Bedrooms: 4+
Baths - Full: 3+
Baths - Half
Year Built
SqFt Living: 3000+
SqFt Total
Acres
Total Units

Listing Activity

MLS Number
MLS Status / Date
☐ Active
☐ Coming Soon-No Show
☐ Due Diligence Period
☐ Pending AB

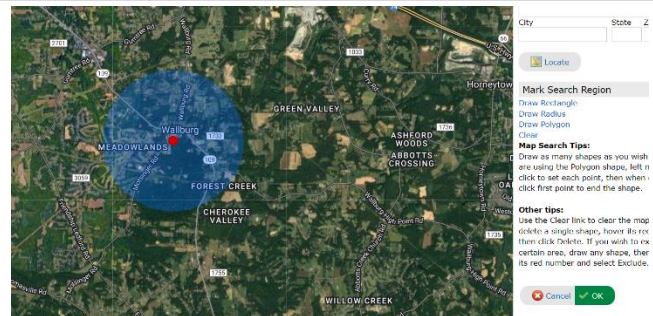


Using Locate Address: Walburg Elementary School, City Walburg, State NC

Then LOCATE

Mark Search Region use Draw Radius

Draw 1 mile out then use OK



Locate Property Owner based on Specific Tax Search Criteria and Location Fields

In this example you have a developer wanting to find potential sites for a new home community in Kernersville. You are tasked with finding property owners of vacant tracks between 50-150 acres.

- Forsyth County
- Kernersville City
- Acres 50-150

Results: click in the gray section of any column header to Remove or Insert columns of data. Insert Lot Acres. This displays the acreage the owner is paying taxes on.

Columns of information to pay attention to in this example: sort by Year Built properties displaying no Year Built or Sq Footage or BR or Bath information typically indicates vacant land. Also look closely at the Owner Name to determine individual property owner's vs those owned by entities like Duke Power or municipalities.

Gathering Information on a Particular Property

All properties used have been selected at random for Training Purposes Only.

330 Daniel Paul Drive, Archdale NC (Randolph County)

The screenshot shows a 'Tax Search' interface with two main sections: 'Ownership' and 'Location'. The 'Ownership' section includes fields for Owner Last Name, Owner First Name, Owner Occupied (a dropdown menu), and Foreclosure Indicator. The 'Location' section includes fields for House # (330), Direction (a dropdown menu), Street Name (Daniel Paul), Type (a dropdown menu), Direction (a dropdown menu), Unit #, County (a dropdown menu with Randolph selected), City (Archdale), Zip Code, APN / Tax ID, County School District, and Commercial Building Name. A 'Map Search' button is also present. Below the search filters, there is a table of results. The first result is highlighted with a blue arrow pointing to the 'Property ID 1' column. The table has columns: Property ID 1, Address, Lot Acres, Owner Name, Property Zip Code, Year Built, and Subdivision. The first row shows the address 7708-26-6416, a lot of 1.00 acres, owner Kingsfield Forest, zip code 27013, year built 1997, and subdivision Kingsfield Forest.

Property ID 1	Address	Lot Acres	Owner Name	Property Zip Code	Year Built	Subdivision
7708-26-6416		1.00	Kingsfield Forest	27013	1997	Kingsfield Forest

Results

1. On the Tax Grid Results
2. Click on the Property ID # to open the 360 Property View

Property View Reports

Tax: Tax Assessor Data

Last Listing: If the property has been listed by a member of Triad MLS back to 1996 this will be the last MLS Report.

Photos: if there are any MLS photos stored in the Triad MLS service

History: Listing History from Triad MLS; Sales History from Public Records; Mortgage History from Public Records

Parcel Map: includes a Satellite image, a Map view with estimated lot dimensions and estimated total lot square footage, and the larger Map view where several options are available Zoom In or Out; Left click on parcel to identify property owners; Layers – layer in any of these Boundaries

Flood Map: see the **NOTE at the bottom of this map** “This map/report was produced using multiple sources. It is provided for informational purposes only. This map/report should not be relied upon by any third parties. It is not intended to satisfy any regulatory guidelines and should not be used for this or any other purpose.”

Foreclosure: If there is currently any Substitute Trustee data on record

AVM: Automated Valuation Marketing

(1) RealAVM™ is a CoreLogic® derived value and should not be used in lieu of an appraisal.

(2) The Confidence Score is a measure of the extent to which sales data, property information, and comparable sales support the property valuation analysis process. The confidence score range is 60 - 100. Clear and consistent quality and quantity of data drive higher confidence scores while lower confidence scores indicate diversity in data, lower quality and quantity of data, and/or limited similarity of the subject property to comparable sales.

(3) The FSD denotes confidence in an AVM estimate and uses a consistent scale and meaning to generate a standardized confidence metric. The FSD is a statistic that measures the likely range or dispersion an AVM estimate will fall within, based on the consistency of the information available to the AVM at the time of estimation. The FSD can be used to create confidence that the true value has a statistical degree of certainty.

PRINT select any or all the 360 Property Views

VIEW COMPARABLE PROPERTIES (see page 1 & 2)

NOTE: detailed training offered in the Finding Comparable Data class.

Owner Occupied

When using this Yes or No selection remember selecting No simply **means that tax notices/bills are sent to a different location than the property address.**

Example:

Criteria

Map

Results

Tax Search

Ownership

Owner Last Name

Owner First Name

Owner Occupied

No

Foreclosure Indicator

☐ Actively in Foreclosure

Location

House #

Direction

Street Name

Type

Direction

Unit #

More

Map Search: No Map Selected

City

Zip Code

APN / Tax ID

County

Davidson

Forsyth

Guilford

Randolph

--- more (click) ---

County School District

Commercial Building Name

Transaction Activity

Last Sale Date (Tax Data)

Last Sale Price (Tax Data)

☒ (000s)

Seller Name

Valuation

RealAVM™ Estimate

☒ (000s)

Assessed Value

Characteristics

Bedrooms

4+

Baths - Full

3+

Baths - Half

Year Built

1995+

Stories

SqFt Living

3000+

SqFt Total

Acres

2+

Total Units

Pool Y/N

Listing Activity

MLS Number

MLS Status / Date

☐ Active

☐ Coming Soon-No Show

☐ Due Diligence Period

☐ Pending AB

☐ Pending

☐ Short Sale Contingent

☐ Temporarily Off Market

☐ Closed

☐ Rented

Clear

69 matches

Map

Results

Results select all/Print/Owner Name Tax Address/Print to PDF (the owner's address is where the tax bills are sent).

Foreclosure Indicator: Actively in Foreclosure

Corelogic accesses publicly recorded information from the county's tax data. The information they capture is when a substitute trustee deed has been recorded in the past 12 months.

Triad MLS members using this tool are strongly encouraged to use this cautiously. Substitute Trustee Deeds can be recorded when the mortgage company is beginning the foreclosure procedures AND they can be recorded when the mortgage company is simply assigning a new attorney as the Substitute Trustee

Per Corelogic

Foreclosure and Distressed Sale Indicators

Realist supports indicators for the following:

-  **Pre-foreclosure:** Properties for which a notice of default has been issued or for which a lis pendens has been recorded. (In NC the instrument used is a Substitute Trustee Deed).
-  **Auction:** Properties scheduled for auction.
-  **Bank Owned/REO:** Properties purchased by banks or investors at auction.
-  **Short Sale &**
-  **REO Sale:** Short sale indicators flag properties for which the most recent sale transaction was projected to be for a price less than the outstanding mortgage balance, while REO sale indicators flag properties sold by banks and institutions acting on their behalf. Together, they are known as distressed sale indicators.

Realist Tax System

Realist Tax	Add/Edit	Market Reports	Re
Realist Tax System			
Matrix 360 Public Record Search			

Use the full Realist system rather than Matrix 360 Public Record Search

to create Mailing Labels or find property ownership information on properties outside these areas of North Carolina.

All information in Matrix 360 Public Record Search feed from Realist Tax.

Triad MLS Matrix 360 Coverage

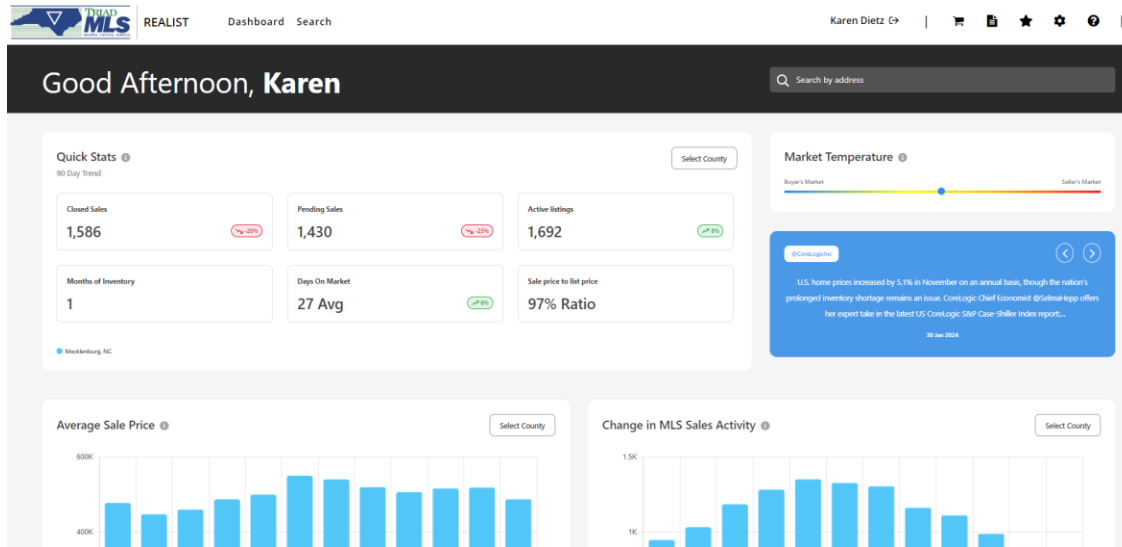


The full Realist User Guide can be found on the Realist Dashboard by using the question mark icon (upper right).

The Dashboard is the default view. To customize the Realist Dashboard use the last icon located upper right



To search by a specific address, use the Search by Address bar. To perform more detailed search use SEARCH (beside of Dashboard)



When using SEARCH always use Change County to identify the specific county the search results are to be located in. While selecting up to 8 counties is possible, it is well advised that selecting one per search is best.

Neighbors and Neighborhood Profile Reports only available using the full Realist Tax search.

Example: You have a listing at 4202 Oak Hollow Drive, and you would like to produce the Neighbors and Neighborhood Profile Reports.

1. Search by Address: 4202 Oak Hollow (select 4202 Oak Hollow, High Point NC)
2. Select and Proceed
3. REPORTS (lower screen right)
4. Property Details (Tax information – this report can be produced using Matrix 360 Public Record)
5. Comparables: (Corelogic's algorithm has found potential comparable sales. Use the Search Criteria link (upper screen left) to see the criteria used and to modify. This same report can be produced in Matrix 360 Public Record)
6. Market Trends **
7. Neighbors ** (modify the search criteria if desired (upper screen left)).
8. Neighborhood Profile ** (modify the search criteria if desired and Customize the View (upper screen left)).

Finding comparable data on **areas outside** the Triad MLS Service and mandatory listing areas

NOTE: The Triad MLS Service and Mandatory listing area consists of the following Counties: Guilford, Forsyth, Davidson, Randolph, Rockingham, Davie, Surry, Stokes, Wilkes, and Yadkin in North Carolina.

1. Search by Address = 138 Cheyenne Wilmington
2. Select and Proceed
3. REPORTS (lower screen left)
4. Comparables – while having the ability to identify all the recent Tax Sales in that area, determining whether the properties were listed in that area’s MLS is not. To change the Search Criteria for the comparables use the “Search Criteria” link (upper screen right). To produce a report for the properties that have been selected (must be checked) use Generate Report

Any assistance needed with Matrix 360 or Realist Tax email
helpdesk@triadmls.com.