

Advisor Bulletin: Second Quarter 2019

Dear Advisors, Chapter Presidents, Candidate Guidance Chairs, and Chapter Executive Staff:

Why am I getting this Bulletin, anyway?!?

If you are a chapter executive director, candidate guidance chair, or candidate advisor, you are getting this bulletin to keep you current on Admissions and CE topics that have recently come up. If you hold none of those positions or are an advisor who had intended to leave the program, let me know and I'll check into it!

IMPORTANT: Candidate Contact Log

Don't forget to record your Q3 comments for your advisees as soon as possible; given the upcoming website unavailability, please do so no later than September 25. We will NOT be going back to add 3Q notes for those who forgot to leave them; if you have an important item you want to note and are unable to record it before September 25, you can add it to your Q4 entry.

New Association Management System and Advisor Portal

As you no doubt have [read in recent communications](#), our new Association Management System (AMS) will launch on October 1. From the navigation column you will see on your personal account home page after you login, you will click on "Advisor Portal" to see your list of Candidates. To leave comments, you will click on "Update" – which takes you to the contact information and your previous notes for each Candidate, as well as their Candidate checklist showing both what they've completed and what remains to be done. We'll discuss this more after it goes into effect, but I wanted to give you a heads-up on what to expect. A few important points:

- If a Candidate is pursuing two (or more) designations concurrently, you will see them listed twice (or once for each designation pursued). Each will have a separate Candidate checklist, but they do not need to make separate progress on each: making progress towards either designation is fine. The Candidate should know the most expeditious route – for example, to pursue the MAI first and then the AI-GRS or SRA – but if they choose to deviate from that, knowing that they may be completing more requirements that way, that's their choice.
- You can only add one note per quarter, but you can edit that note throughout the quarter. For example, if you originally wrote that you reached out, you can add later that your call was returned, that exam results were received, or whatever additional information you wish to add.
- There will be no Annual Minimum Progress (AMP) chart, since forward progress is now what is required and not a specific number of items completed. I find it useful to keep track in my Candidate comments, so I can see if progress was made. Remember, progress is attempting a requirement, even if (for example), the exam was failed, experience wasn't awarded in full, etc. Signing up for a course or exam but not taking it is NOT considered progress.
- Just as happens now, while you can see what the Candidate has completed, you won't be able to tell if something is scheduled or in progress. You will normally get that information from the Candidate, but you can also ask me, if necessary or to confirm.

Comprehensive Exam – windows and timing

As a reminder, comp exam results are normally ready about 30 business days **after the end of the exam window**. We are hoping to have the August results available in early- rather than mid-October. Keep in mind that results for all examinees are released on the same day, regardless of when the exam(s) was taken.

Scholarships

The Appraisal Institute Education & Relief Foundation offers [scholarships](#) in addition to any that your chapter might offer. Next deadline is September 15. Scholarships are for courses only (not exams or Capstone) and do not apply to those retaking a course.

If a Candidate needs emergency assistance due to a natural disaster, medical emergency, etc., he/she may apply for assistance through the [Appraisal Institute Education & Relief Foundation](#).

Capstone program (General Demonstration of Knowledge option)

The 2020 [Capstone](#) schedule should be announced later this month, but due to the AMS, they will not be taking registrations until October. If one of your Candidates might want to take Capstone next year, they should be sure they are eligible, since they cannot register otherwise. (No, they cannot register if they are taking – but have not yet completed/passed – a prerequisite.) First quarter and synchronous offerings tend to reach capacity the most quickly. Capstone prerequisites are:

1. The [General Demonstration Appraisal Report Writing](#) seminar (must have been completed within five years prior to Capstone registration); and
2. *Advanced Market Analysis and Highest & Best Use*.

Candidates who have previously taken a Capstone program and need to retake it must select an offering with a *different* case study. Candidates can inquire with the Education area (312) 335-4207 or education@appraisalinstitute.org

The Capstone program is one of several general Demonstration of Knowledge requirement options.

Standards & Ethics requirement

There seems to be more confusion than usual lately regarding the first-year Standards and Ethics requirement for Candidates. This requirement consists of both Standards (i.e., USPAP) and *AI Business Practices and Ethics*. USPAP can be from any approved provider (the Candidate normally provides a certificate of completion if the program wasn't completed through AI), but AI is the only provider for BP&E, which covers the Code of Professional Ethics and Standards of Professional Practice of the Appraisal Institute.

Candidacy termination – reasons and timing

While we generally can't give an advisor any specific information about a Candidacy termination, for privacy reasons, we can give you the following general guidelines:

- Terminations of Candidacy for reasons of nonpayment of yearly Candidate fees take place in September (just as they do for Member dues)
- Terminations of Candidacy due to not completing the first-year Standards & Ethics requirement take place 6 months after the first-year timeline ends (Candidate will have been suspended those 6 months).
- Terminations of Candidacy for not meeting Annual Minimum Progress generally take place in January; terminations for not meeting the Candidate timeline (and no extension is in place) usually take place a week to 10 days after the end of the Candidate timeline.

As always, thank you for your service to the AI!

Best Regards,
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