Appraisal Institute®

AI Candidate Advisor Handbook

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Welcome to the AI Candidate Advisor Program!

This AI Candidate Advisor Handbook provides details regarding the AI Candidate Advisor Program. You will find many helpful tips, suggestions and resources that will make this program meaningful for you and the Candidate(s) you have volunteered to help become AI Designated members!

We cannot thank you enough for offering your time and knowledge to assist Candidates in their designation process. As you know, the designation process can be challenging and often seems endless, but that is where you play a role! As a Designated member, you are in a unique position to assist those completing their designation paths in a positive and efficient manner.

What Do AI Candidate Advisors Do?

They...

> ➤ Contact
> ➤ Encourage and motivate
> ➤ Coach
> ➤ Monitor
> ➤ Guide
> ➤ Respond
> ➤ Support

Contact

AI Advisors have regular contact with the Candidate via phone, email and/or in person.
AI requires that you contact each Candidate at least once per quarter.

Encourage and Motivate

AI Advisors encourage their Candidates to complete all designation requirements and become a Designated member.
AI Advisors recommend that Candidates create an action plan to meet their requirements related to their Timeline to Designation and Annual Minimum Progress. AI Advisors also motivate Candidates to manage their own learning.

Coach

AI Advisors coach Candidates through active listening, observation, and support.

Monitor

An AI Advisor monitors a Candidate's progress by inspiring him/her to complete Timeline to Designation and Annual Minimum Progress requirements on time.

Guide

AI Advisors refer Candidates to appropriate resources, such as Appraisal Institute admissions staff members and information on the Appraisal Institute website.

Respond

AI Advisors respond, to the best of their ability, to Candidate questions, concerns, and requests.

Preparation for Becoming an Effective Candidate Advisor

There are many resources to help you serve as an AI Candidate Advisor. You have likely already completed the online Advisor orientation and Advisor agreement form.

The next step is to educate yourself on the Candidate for Designation process so that you can effectively motivate your Candidate and foster a meaningful AI Advisor/Candidate relationship.

Candidate for Designation Program Overview
This PowerPoint provides an overview of the Candidate for Designation program, by explaining every requirement for each designation path.

AI Designation Paths and Requirements
Click on a designation emblem to see an overview of the requirements for that designation. You can also access different forms available to Candidates on this webpage, including Candidate extension requests.

My Candidates for Designation
On your AI login page, you will have a link to your Advisor Portal. In this portal you may view each Candidate assigned to you as well as their Candidate checklist (which shows what requirements have been completed and are outstanding).

Fees Related to Candidacy
Admissions-related fees for designation requirements, such as Experience, Demo and Comp.

Advisors: Information for Designated Members
Learn more about your role as an AI Advisor.

Candidate Policy Manual
This manual outlines policies and procedures of the Candidate for Designation program — a companion document to Regulation No. 1, Admission to General Candidacy and MAI Membership, Regulation No. 2, Admission to Residential Candidacy and SRA Membership, and Regulation No. 3, Admission to General and Residential Review Candidacy and AI-GRS and AI-RRS Membership.

Learn More About Your Advisor Portal
This video shows you basic navigation through the Advisor Portal on your AI login page.

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What Should You Expect in the Beginning?

Upon completion of the Advisor orientation and agreement form, you will be active as an AI Candidate Advisor in the national database. We will make sure you are available to Candidates on the designation paths you have chosen (i.e., MAI, SRA, AI-GRS, AI-RRS).

You will indicate how many Candidates you want to advise. When this number is reached you will become invisible until a spot opens.

When selected, you—and the Candidate—will receive a pairing email with your contact information enclosed. The Candidate will then show up on your Candidate webpage and your information will appear on the Candidate's Advisor webpage.

We highly recommend that you contact the Candidate immediately after receiving the pairing email. A first impression is everything and it begins with you, so send the Candidate a short email initiating introductions and welcoming him/her to the Candidate program; or feel free to call the Candidate. Some Advisors prefer to speak with their Candidates instead of emailing them, so how you communicate with your Candidates is up to you. And remember to record *all* contacts (even attempted contacts).

Your first task is to gauge a Candidate's strengths and limitations. Some questions to ask: Can he/she easily travel? Does he/she prefer online programs? Is his/her company paying for tuition and courses? Does his/her chapter frequently host course offerings? Does he/she want to skip the course and simply take and pass the exam (a.k.a. challenge the exam)? How aggressively does he/she want to pursue designation?

Your second task is to help the Candidate draft an action plan—which might need an adjustment along the way. Some questions to ask: Is he/she taking a couple of courses straightaway because the local chapter is offering them? When does he/she want to submit experience? Which Demonstration of Knowledge option is most appealing? And in what year of his/her Timeline to Designation does he/she wish to complete it?

Candidates should plan, but many don't think about the next requirement until they've completed the last one, and this may prove problematic because they may miss a registration deadline or lack a prerequisite.

Tips on Designation Requirements

You might be asked many complex questions on designation requirements and answering to these questions might be complicated and might vary among Candidates, so your best response would be to refer Candidates to the AI Admissions area at admissions@appraisalinstitute.org or (312) 335-4111.

When advising a Candidate, your best resource is his/her Candidate Status Report. This personalized report contains the most accurate information for a Candidate.

Standards & Ethics Requirement

Candidates who have never been affiliated with the AI must provide proof of their most current USPAP (if not taken with AI) or IVS (if they live outside the U.S.) and must complete *AI Business Practices and Ethics* (BP&E) in their first year of candidacy. Candidates readmitting into the program must complete Standards (USPAP/IVS) and Ethics (BP&E) *prior* to readmission. (Both required courses may have been taken within the last four years.)

How can I help as the Candidate's Advisor?

Candidates often overlook the AI *Business Practices and Ethics* course despite repeated reminders. The course (no exam) may be taken online over 30 days, making it a convenient requirement to complete. The first-year Standards & Ethics requirement, along with its corresponding due date, will appear on a person's Candidate Status Report. If a Candidate misses this deadline, his/her candidacy is suspended. If a Candidate does not complete this requirement within six months of the initial deadline, his/her candidacy is terminated.

Course and/or Exam Requirements

AI may honor equivalencies based on the completion of AI retired courses, but it generally depends on when the courses/exams were completed. AI also honors equivalencies for those who hold certain credentials from organizations or for those who hold certain graduate degrees.

Candidates should e-mail admissions@appraisalinstitute.org if they have a question related to a requirement on their Candidate Status Report.

A requirement that reads "attend course and pass exam" requires a Candidate to complete the course **and** pass the corresponding examination. Many courses are available online—with 30 days to complete—or via synchronous (live online). In both scenarios, a Candidate must take the course and pass the exam (in person at a Pearson VUE testing center). A requirement that reads "pass exam" requires a Candidate to *only pass* the exam for the course (a.k.a. challenge the exam). In this scenario, a Candidate receives the course material, studies for the exam, and passes it at a local Pearson VUE testing center.

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Comprehensive Examination Requirement

The comprehensive exam is based on the entire Appraisal Institute body of knowledge. It may cover anything in the required examinations and courses, current appraisal literature, and the AI Regulations and Bylaws. It is designed to measure a Candidate's ability to integrate classroom knowledge with personal experience and judgment. The object of the exam is to test how a Candidate functions in the real estate world beyond the formulaic problems of the course laboratory.

[The Comprehensive Examination Guidebook](#)

Demonstration of Knowledge Requirement

Various demo options have been developed over time to provide alternatives to writing a traditional demo report. Each option requires the Candidate to demonstrate basically the same skill set, but not every option works for every Candidate. Always refer to the AI website (links below) for current options and guidelines.

[The Official Guidebook to the Demonstration of Knowledge Requirement: General](#)
[The Official Guidebook to the Demonstration of Knowledge Requirement: Residential](#)

Experience Requirement

The Candidate must receive credit for a specified number of hours of experience in the form of either Specialized Experience (MAI and AI-GRS) or Residential Experience (SRA and AI-RRS). The work submitted for credit must cover a time that encompasses work from the current date and goes back in time, but not to exceed 10 years.

The work must comply with AI Standards of Professional Practice. All logged experience assignments must have been performed for a business purpose: there must be a client; an intended use other than for experience credit; and an intended user other than the Appraisal Institute. An assignment/report prepared as a sample for experience purposes is not eligible. In the case of reviews, only reviews performed in the normal course of business based on a completed appraisal will qualify. Reviews conducted for internal quality control, and not meeting standards, will not qualify.

[Experience Credit Candidate Guidebook](#)

Annual Minimum Progress (AMP)

Candidates for Designation must demonstrate Annual Minimum Progress each year on designation requirements for MAI, SRA, AI-GRS and AI-RRS designations. Such progress shall be defined by the ADQC. Candidates must complete or attempt to complete one or more of his/her designation requirements every year.

Candidates may receive an extension due to military service, serious Illness or disability, or other good cause shown. Extensions are not automatically granted.

What counts towards Annual Minimum Progress?

Requirements listed on a Candidates checklist (except for the designation application). Submitting an Experience submission, Demo submission, taking a required course, taking a required exam, or signing up and taking the Comprehensive Exam demonstrates progress. Demonstrating progress is essential to receiving an extension.

Where can I direct the Candidate to request an extension on the Annual Minimum Progress requirement?

Candidates may request extensions through their Candidate checklists on their AI login pages.

Timeline to Designation and Maximum Length of Candidacy

Maximum Length of General Candidacy

Except where otherwise provided, a general Candidate must complete the requirements for MAI designated membership within four (4) years from the date of admission to general Candidacy.

Maximum Length of General Review Candidacy

Except where otherwise provided, a general review Candidate must complete the requirements for AI-GRS designated membership within four (4) years from the date of admission to Candidacy.

Maximum Length of Residential Candidacy

Except where otherwise provided, a residential Candidate must complete the requirements for SRA designated membership within three (3) years from the date of admission to residential Candidacy.

Maximum Length of Residential Review Candidacy

Except where otherwise provided, a residential review Candidate must complete the requirements for AI-RRS designated membership within three (3) years from the date of admission to Candidacy.

View **recommended timeline completion chart** **for all designation paths and timelines.**

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Timelines to Designation for Candidates with One to Three Core Requirements

For Candidates who have one to three core requirements remaining at the time of admission/readmission.

Number of core designation requirements remaining	Timeline to Designation
One (1) core designation requirement	1 Year
Two (2) core designation requirements	2 Years
Three (3) core designation requirements	3 Years

Note: For Candidates who have four or more core requirements remaining, please refer to the section called Timeline to Designation Maximum Length of Candidacy.

What Information Can I See? What Can I Not See?

Note: Some information may not be available due to confidentiality and privacy concerns.

What you CAN see

- Candidate **Timeline to Designation end date**
- **Candidate checklist** (designation requirements completed and outstanding)
- **Candidate(s) directory information** via Find An Appraiser. You can only see a Candidate's name, email address and phone number from your Advisor page
- Email notification when a Candidate receives a **Timeline to Designation extension or an Annual Minimum Progress extension**
- Status of candidacy (active, suspended or terminated)
- Email notification on a terminated candidacy
- Email notification when an extension is approved or denied. AI staff will include a Candidate's pledge in the email so Advisors can help the Candidate fulfill said promise.

What you CANNOT see

- Courses or exams (scheduled). Please ask AI staff and we can usually provide that information
- Candidate's AI education transcript
- A Candidate's pass or fail email notification for education or other designation requirements
- Reason for the suspension or termination of a candidacy
  - Suspensions for nonpayment of fees occur in June
  - Terminations for nonpayment of fees occur in September
  - Terminations for failure to make Annual Minimum Progress typically occur in early February
  - Terminations for an expired Timeline to Designation typically occur a week after the timeline end date
  - Suspensions for failure to meet first-year Standards & Ethics typically occur a week after the deadline
  - Terminations for failure to meet first-year Standards & Ethics occur about six months after the initial deadline
- A Candidate's confidential extension request

Candidate Termination

If a Candidate fails to complete his/her requirements by the end of his/her Timeline to Designation or fails to adhere to the rules of Annual Minimum Progress (as defined by the ADQC), his/her candidacy may be terminated.

Candidates whose candidacies are terminated due to failure to satisfy Annual Minimum Progress or Timeline to Designation requirements shall be automatically transferred to the Practicing Affiliate category at least 30 days after the termination notice is sent.

Once a Candidate is readmitted, he/she will be subject to the requirements in effect on the date of readmission, as modified from time to time. Candidates *may* receive credit for designation requirements completed within 10 years of their most recent application for Candidacy if those requirements are still applicable at the time of readmission.

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Recording Candidate Contact

In your AI login page, you will find a navigation list on the left of links. One of those links is called Advisor Portal.

You will see a button called **Update** next to each Candidate assigned to you. Click the button to update comments or view comment history (confidential, Candidate does NOT see), access to Candidate checklist of designation requirements, Timeline to Designation, etc.

You may add or edit comments by clicking the Add button, in the row for the quarter you are entering comments for. Please **do not** leave comments here for AI staff. Email admissions@appraisalinstitute.org to send comments to AI staff.

Important!

Please make sure you have logged your past contact/comments with each Candidate, even if it's just to say, "contact made" or "contact attempted." Contact doesn't need to be a discussion or a meeting; you can drop a quick e-mail or leave a voicemail reminding a Candidate about Annual Minimum Progress, or Timeline to Designation if he/she is in his/her last year. You must log your contact with each Candidate in your Advisor Portal, otherwise we are required to follow up with the Candidate directly.

Quarterly contact and the recording of it *is required* for AI Advisors, per AI regulations. If you fall behind on either making contact or logging contact, just let us know and catch up when you can. If you fall behind over an extended period, you might consider asking AI staff reassign your Candidates. Advisors who do not enter contact in the contact log for an extended period may be removed from the program.

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AI Continuing Education Credit

You may receive AI CE credit (up to 125 points per AI CE cycle) for your service as a Candidate Advisor.

The service is not automatically recorded; you will need to add it to your AI CE log at the end of each year or once per cycle if you prefer. We do not require you to record a certain number of hours for each Candidate, only that you make contact once per quarter.

1. **Locate your AI CE checklist at the bottom of your AI login page.**

2. **Click into your AI Points requirement.**

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3. **At bottom, locate the Self-Report Points section and click the Report CE button.**

4. **Enter the information as requested. Points will automatically update based on the number of hours you enter for service as an Advisor (25 hours max per AI CE cycle).**

5. Your points will be listed accordingly.

Self-Reported Points					
Report CE					
Program Name	**End Date**	**Category**		**Points**	
Advisor	05/01/2019	Services as an AI Candidate Advisor		125.00 [Attend]	Edit Delete

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Frequently Asked Questions (FAQs)

What does it mean if I am listed as an available Advisor?

It means you have completed the AI Advisor orientation and signed the AI Advisor agreement, volunteering to advise any AI Candidate who is on a designation path you have agreed to advise. As an available Advisor, you can be selected by Candidates living across the United States. Candidate and Advisor pairings are not restricted to chapters or states. Since communication is generally done via email and/or phone, long-distance pairings work well.

Please do not request to advise Candidates in certain chapters, companies or with specialties. Our program is not designed for personalized Candidate and Advisor pairings. All Advisors should be willing to help any Candidate on a path that an Advisor is comfortable advising. You may request to advise a specific Candidate; however, the Candidate must make their own Advisor selection.

May I reject a Candidate that has selected me?

Yes. When you receive notification that a Candidate has selected you, please email Admissions@appraisalinstitute.org to reject the selection. You can also ask that a Candidate be paired with another Advisor due to lack of communication or conflict of interest.

May I advise Candidates who are working towards a designation I do not hold?

Yes. Although many Advisors are more comfortable advising Candidates working towards designations they hold, they are not expected to know all the details of how to complete a specific requirement.

May I add designation paths to my list of paths I'm willing to advise?

Yes. Advisors who are willing to advise on more than one path are highly sought after. Candidates pursuing more than one designation may change Advisors several times as they complete different designations. We always encourage Advisors to advise on more than one path if they are comfortable doing so.

An additional Candidate has requested me as their AI Advisor. How do I adjust my availability?

If your status is full (i.e., you have as many Candidates assigned to you as you agreed to advise), your name will not appear on the list of available AI Advisors. To make yourself available to one additional Candidate, you must give AI staff permission to do so. Please send an email to admissions@appraisalinstitute.org. If the Candidate contacts us to request you, we will either contact you for permission or ask the Candidate to contact you for approval. We do ask that you confirm via email.

Advisors are free to adjust their stated maximum number of Candidates at any time, as well as add or remove paths. We will not automatically add a new path to your availability if you attain an additional designation.

What happens when my Candidate(s) becomes Designated?

When one of your Candidates become designated, it will free up one spot in your availability. If you no longer want to accept additional Candidates, please let AI staff know immediately by emailing admissions@appraisalinstitute.org. If you know in advance that you no longer want to advise once your Candidate(s) earn the designation, please let us know immediately so we can update your account by resigning you from the Candidate Advisor program. Any time you have an open slot, you may be selected by a Candidate until you tell us otherwise.

What if a Candidate tells me they are no longer interested in being a Candidate for Designation?

Please urge Candidates to email or call the AI Admissions department so they may communicate with an AI Admissions counselor who will inform them of their options, including the consequences of leaving the Candidate for Designation program.

National Staff Contact

Emma Abraham, Specialist

AI Candidate Advisor Program

Admissions@appraisalinstitute.org

(312) 335-4288

End of Handbook