

Candidate for Designation Resources

2026

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Introduction

This document is designed to guide you through the key requirements, tools, and resources available to you as a **Candidate for Designation**.

Throughout your designation journey, the **Appraisal Institute Membership team** is available to provide support, answer questions, and help you successfully navigate each step of the process.

We encourage you to take full advantage of the resources outlined in this guide and wish you continued success as you work toward earning your designation.

Best of luck,
Your Membership Team

Questions?

Please visit our [Support Center](#)

AI Account Login Page

Use the numbered reference points in the image to quickly locate key features within your account.

The screenshot shows the AI Account Login Page with the following features and numbered reference points:

- 1**: Edit button (yellow) next to the profile photo.
- 2**: Account # field.
- 3**: Change Member Category button (yellow) under Current Membership Category & Status.
- 4**: Change My Chapter button (yellow) under Iowa Chapter.
- 5**: Location field.
- 6**: Phone field.
- 7**: Work Phone field.
- 8**: My Checklists button (yellow).

On the right side, there is a sidebar menu with the following items:

- My Profile
 - Contact Information
 - Find an Appraiser Profile
 - Change My Password
 - State License(s)
- Personal Information
 - My Support Requests
 - Transactions
 - Invoices
 - Automatic Payments
 - Donations
- Education and Events
 - Downloads
 - My Committees
 - Affiliation
 - Category Change Application
 - Add Candidate Path Application
 - Member Directory

Below the sidebar, there is a section for "Click Here to Update Your Personal Account Information" with a link to "To help us serve you better, please update your personal account information today!".

Checklist	Start Date	Due Date	Status	
General Candidate for Designation	05/01/2026	05/31/2030	In Progress	View Requirements

1. Photo (Edit Button)

Click the **“Edit”** button to upload or update your profile photo.

Adding a photo improves your visibility in both the **Find an Appraiser Directory** and the **Member Directory**.

2. Account Number

Your **Account #** is displayed on the left-hand side.

This is your unique Appraisal Institute identifier and should be referenced when contacting support.

3. Change Member Category

Located under your current membership category & status.

Select **“Change Member Category”** to submit a request to transition to another category (e.g., Associate Member, Affiliate Member, Student Affiliate).

4. Change My Chapter

If your location changes, select **“Change My Chapter”** to request reassignment based on geographic boundaries. Be sure to update your address before requesting the Chapter Change, if appropriate.

5. My Profile (Right Navigation Panel)

Under the **My Profile** section (top-right menu), you can:

- Update contact details, company information, and social media links
- Control visibility in directories
- Add external credentials
- Edit your **Find an Appraiser Profile**, including your welcome message and service area visibility
- Change your password
- Update your state license(s)

6. Personal Information, Support & Transactions

Also located in the right navigation panel:

- **Personal Information** – Add details such as valuation focus, work setting, and field of practice
- **My Support Requests** – View history of support emails and calls
- **Transactions** – View invoices, payments, and balances

7. Education & Events

From the same right-side menu:

- **Education and Events** – Access:
 - Begin and continue online courses you're registered for
 - Course history
 - Certificates
 - Course materials
 - Education transcripts
 - Re-exam registration

8. My Checklists

Located in the main dashboard area (center of page).

Tracks your **requirements to designated membership**

- Click **“View Requirements”** to monitor progress

(next page)

Candidate Checklist (with Visual Navigation)

When you select “**View Requirements**” and navigate to your Candidate Checklist, the top section of the page provides key information about your progress toward earning an Appraisal Institute designation.



A screenshot of the top section of a Candidate Checklist page. The background is light purple. On the left, there are four lines of text: 'Affiliation: General Candidate', 'Status: In Progress', 'Start Date: 05/01/2026', and 'Due Date: 05/31/2030'. On the right, there is a 'Need Help?' section with the phone number '(888) 756-4624' and the email address 'customerservice@appraisalinstitute.org'.

Affiliation: General Candidate	Need Help? (888) 756-4624 customerservice@appraisalinstitute.org
Status: In Progress	
Start Date: 05/01/2026	
Due Date: 05/31/2030	

1. Membership Type

Your checklist reflects the designation you are pursuing:

- **General Candidate** → MAI path
- **Residential Candidate** → SRA path
- **General Review Candidate** → AI-GRS path
- **Residential Review Candidate** → AI-RRS path
- **General Review Alternative Candidate** → AI-GRS path
- **Residential Review Alternative Candidate** → AI-RRS path

2. Status

Displayed at the top of the page (see image above):

- **In Progress** – You are in good standing
- **Suspended** – You are not in good standing
- **Terminated** – You are no longer affiliated with the Appraisal Institute and are no longer pursuing designation

(next page)

3. Required Time Period

The **Required Time Period** is the timeframe in which Candidates must complete all designation requirements:

- Standard duration: **Four (4) years**
- Begins on your **Start Date** and ends on your **Due Date**

4. Start Date & Due Date

- **Start Date** – The date you entered the Candidate for Designation program
- **Due Date** – The final day of your Required Time Period

Some Candidates may be eligible to request an **additional Required Time Period** to continue working toward completion.

5. Maximum Length of Candidacy

- Candidates are expected to complete all requirements within **four (4) years**
- If requirements are not completed in that timeframe:
 - Candidates may request a **new Required Time Period** (if eligible)
 - This may involve **Invalidation and Restoration of Credit**
- If no longer eligible for an extension, candidacy will be **terminated**, and the individual will transition to the **Practicing Affiliate category**

(next page)

Affiliation: Residential Candidate
Status: In Progress
Start Date: 03/24/2026
Due Date: 03/31/2030

Need Help?
 (888) 756-4624
customerservice@appraisalinstitute.org

Your Advisor Information
 Name:
 Email:
 Phone:

Checklist Legend:
 Locked Unlocked Under Review Met

HIDE MET REQUIREMENTS

6. Checklist Legend (Visual Indicators)

As shown in the images:

- **Locked** – Requirement cannot be completed yet (typically due to prerequisites)
- **Unlocked** – Ready for action (e.g., register, submit, complete exam)
- **Under Review** – Currently being reviewed by AI staff; no edits allowed
- **Met** – Requirement is fully completed

7. Show / Hide Met Requirements

- The checklist **defaults to hiding completed (“Met”) requirements**
- Select **“Show Met Requirements”** (see third image) to display all completed items

Additional Information (Visible in Image)

- **Advisor Information** may be displayed, including contact details for your assigned advisor. To change your advisor, or select one if you didn’t, please contact the Membership Team.
- A **Help section** (top right) provides contact information for support

(next page)

SRA - Candidate Advisor	✓ Advisor Selected
SRA - Residential Comprehensive Examination Learn everything you'll need to know about the Comprehensive Examination: Comprehensive Examination Guidebook Learn more about all of the designation requirements: Designation Requirement Overview Webinar	✎ Pending Completion of Comp Exam
SRA - Residential Experience Learn about what will be required for your experience submission: Experience Credit Candidate Guidebook Download the AI Residential Experience Log (start logging your experience now) Learn more about free Advisory Guidance! Learn more about all of the designation requirements: Designation Requirement Overview Webinar	🔍 Assigned to Screener
SRA - Residential Demonstration of Knowledge Learn everything you'll need to know in The Official Guide to the Demonstration of Knowledge Requirement: Residential Learn more about all of the designation requirements: Designation Requirement Overview Webinar	✓ Full Credit Received
SRA - Residential Designation Application This application will become available when all requirements are considered "MET". <i>Please make sure your annual Candidate dues are paid in full when applying for designated membership. If your dues are not paid in full when you apply for designated membership, we will be unable to process your designation application.</i>	🔒 Pending Completion of all requirements

8. Checklist Requirements Overview

The main checklist area (see image above of example residential path checklist) displays all requirements:

- Each requirement is **hyperlinked**
- Selecting a link provides:
 - Detailed status information
 - Instructions for completion
 - Relevant resources and guidebooks
- Requirement status appears on the **right-hand side** (e.g., "Pending Completion," "Under Review," etc.)

9. Example Requirements

Typical Candidate Checklist items include:

- **Candidate Advisor Selection**
- **Comprehensive Examination**
- **Specialized Experience**
- **Demonstration of Knowledge**
- **Designation Application**

Each requirement includes specific instructions, status updates, and links to supporting materials.

10. Additional Resources

Within each requirement detail page, you will find links to important **guidebooks and documentation**.

Important: These guidebooks contain critical instructions and policies, review them carefully to ensure successful completion of each requirement.

11. Requirement Detail View (Expanded Information)

When you click on a checklist requirement, a detailed view will open (as shown in example image below). This view provides important guidance, status updates, and actionable steps.

CHECKLIST

Residential Experience
Learn about what will be required for your experience submission: [Experience Credit Candidate Guidebook](#)
Download the [AI Residential Experience Log](#) (start logging your experience now)

Learn more about free [Advisory Guidance!](#)

Learn more about all of the designation requirements: [Designation Requirement Overview Webinar](#)

Status: Assigned to ScreenerHours Required: 3000Hours Awarded: 0

Your experience submission has been assigned to an experience screener. Your screener will select additional report(s) and will add their selections to this page (see below) within a week.

Once the screener's selection(s) have been posted, you will have five days to upload all reports to box.com.

Uploaded Experience Logs

Start Date - End Date	Uploaded Log	Status	Screener	Submission Date	Due Date
04/27/2026 - 10/25/2025	789358-EXP-3.xlsx	Assigned to Screener		06/01/2026	

Selected Reports

Selected By	Date	Identification	Property Type
Candidate	01/31/2026		S-Condo
Screener	04/17/2026		S
Screener	04/20/2026		s-Custom
Screener	04/21/2026		S
Candidate	11/20/2025		S-Complex

Specialized Experience Requirement (Example)

In the detailed view for **Specialized Experience**, you will see:

- **Status:** Displays your current progress (e.g., *Pending Experience Submission, Assigned to Screener*)
- **Hours Required:** Total experience hours needed (example shown: **4,500 hours**)
- **Hours Awarded:** Experience hours already approved (example shown: **0 hours**)
- **Key Resources**
 - **Experience Credit Candidate Guidebook** (requirements and policy)
 - **AI Specialized Experience Log (Excel)**
 - Used to track and document your appraisal experience
- **Important Instructions**
 - Complete your **experience log** before submitting your application
 - Upload your completed log during the application process
 - Submit the required **application fee**
 - Once approved, you will receive instructions for uploading reports via **Box.com**
- **Action Button**
 - **“Submit Experience”** button to begin the submission process

SRA - Candidate Advisor	✓ Advisor Selected
SRA - Residential Comprehensive Examination Learn everything you'll need to know about the Comprehensive Examination: Comprehensive Examination Guidebook Learn more about all of the designation requirements: Designation Requirement Overview Webinar	✎ Pending Completion of Comp Exam
SRA - Residential Experience Learn about what will be required for your experience submission: Experience Credit Candidate Guidebook Download the AI Residential Experience Log (start logging your experience now) Learn more about free Advisory Guidance! Learn more about all of the designation requirements: Designation Requirement Overview Webinar	🔍 Assigned to Screener
SRA - Residential Demonstration of Knowledge Learn everything you'll need to know in The Official Guide to the Demonstration of Knowledge Requirement: Residential Learn more about all of the designation requirements: Designation Requirement Overview Webinar	✓ Full Credit Received
SRA - Residential Designation Application This application will become available when all requirements are considered "MET". <i>Please make sure your annual Candidate dues are paid in full when applying for designated membership. If your dues are not paid in full when you apply for designated membership, we will be unable to process your designation application.</i>	🔒 Pending Completion of all requirements

12. Requirement List with Embedded Resources

Within the main checklist (example image above), each requirement includes:

- Direct links to essential **guidebooks and resources**, such as:
 - **Comprehensive Examination Guidebook**
 - **Experience Credit Candidate Guidebook**
 - **Official Guide to the Demonstration of Knowledge Requirement**
- Supporting tools like:
 - **Experience Log download**
 - Advisory guidance links
- Status indicators on the right-hand side, such as:
 - *Pending Completion of Prerequisites*
 - *Pending Experience Submission*
 - *Pending Demo Option*
 - *Pending Completion of All Requirements*
 - *Full Credit Received*

Important Reminder

- You must ensure all **Candidate dues are paid in full** before applying for designated membership
- Applications for designation will **not be processed** if outstanding balances remain

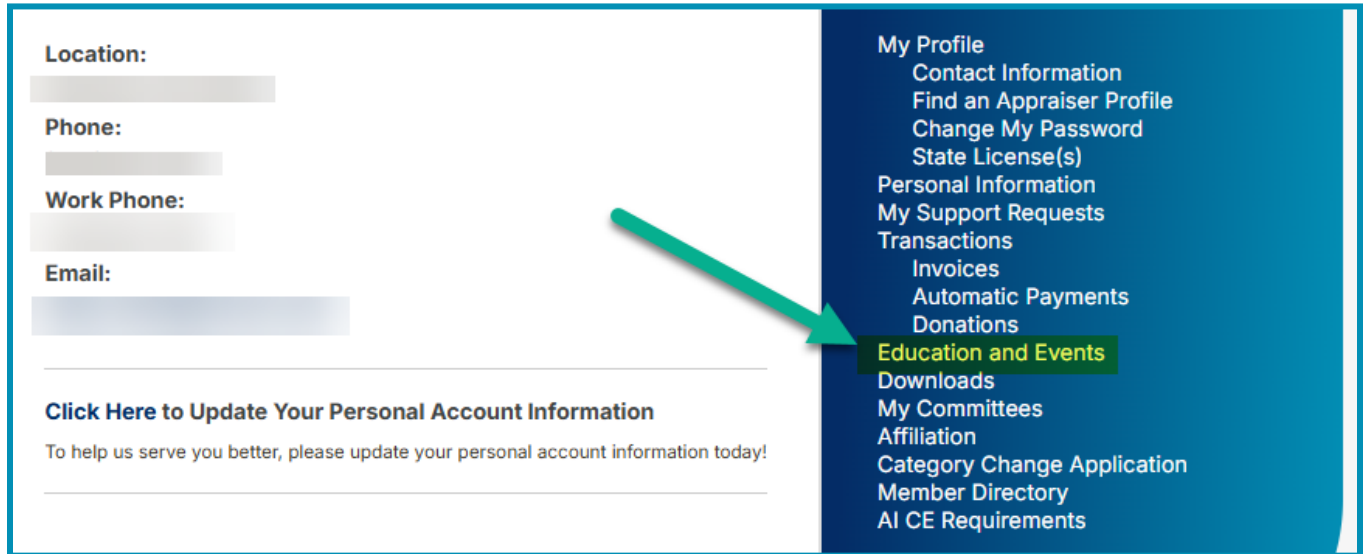
Pro Tip

Each requirement page contains **critical instructions and embedded guidebooks**. Taking time to carefully review these materials will help you:

- Avoid delays in submission
- Ensure accuracy and completeness
- Successfully move through your checklist requirements

Education and Events (with Visual Navigation)

To access your education records, return to your **AI Account landing page** and locate the right-hand navigation panel shown in the image.



Accessing Education and Events

As highlighted in the image, select **“Education and Events”** from the right sidebar menu. This will take you to your complete education dashboard.

What You Can Do on This Page

Within the **Education and Events** section, you can:

- **Begin and continue online courses** you’ve registered for
- View and print your **education transcript**
- Access **completed courses**
- Download **completion certificates**
- Review **course materials**
- Register for or access **exams and re-exams**

How Your Education Is Organized

Your records are displayed in the following order (top to bottom):

1. **Classroom Offerings | Synchronous Offerings | Conferences**
2. **Online Courses**
3. **Exams**
4. **Webinars**
5. **Chapter Social Events**

Connecting with Your Chapter (with Visual Navigation)

Use the images provided to follow the steps below and connect with your local Appraisal Institute chapter.

Location:
[Input Field]

Phone:
[Input Field]

Work Phone:
[Input Field]

Email:
[Input Field]

[Click Here to Update Your Personal Account Information](#)
To help us serve you better, please update your personal account information today!

My Profile
Contact Information
Find an Appraiser Profile
Change My Password
State License(s)
Personal Information
My Support Requests
Transactions
Invoices
Automatic Payments
Donations
Education and Events
Downloads
My Committees
Affiliation
Category Change Application
Member Directory
AI CE Requirements

Step 1: Access Affiliation (Right Navigation Panel)

As shown in the first image, navigate to the right-hand sidebar and select **“Affiliation.”** This section contains your membership and chapter details.

My Affiliations [← GO BACK](#)

Association	Type	Status	Effective	Expires	Joined	Terminates
AI	Candidate for Designation - National	Active - National	01/01/2026	12/31/2026	03/24/2026	

My Chapter Affiliations

Chapter	Type	Status	Effective	Expires	Joined	Terminates	Related Membership
Tennessee Chapter	Candidate for Designation - Chapter	Active - Chapter	01/01/2026	12/31/2026	03/24/2026		Candidate for Designation - National
Region: 9	Candidate for Designation - Region	Active - Region	01/01/2026	12/31/2026	03/24/2026		Candidate for Designation - National

Step 2: View Your Chapter Affiliation

On the **My Affiliations** page (second image):

- Locate the **“My Chapter Affiliations”** section
- Your assigned chapter will be listed (example shown: *Washington DC Metropolitan Area Chapter*)
- Click on the **chapter name** to access additional details

Note: Chapters are available to members located in the **continental United States and U.S. territories**. If you are located outside these areas, you may not have a chapter affiliation.

Chapter Profile

Example

Tennessee Chapter

Type: Chapter
Address: Sheraton Music City Attn: Marina Jellic-Briggs
777 McGavock Pike

Nashville, TN 37215

Phone: (615)515-9700
Email: TennesseeChapter@appraisalinstitute.org
Website: <http://www.tnappraiser.org/>
Active members: 325

Step 3: Review Chapter Profile Information

After selecting your chapter, you will be directed to the **Chapter Profile page** (third image), which includes:

- Chapter name and type
- Mailing address
- Phone number and email contact
- Chapter website link
- Number of active members

We encourage you to visit the chapter website for more information and upcoming events.

Why Get Involved?

AI Chapters are highly active and offer valuable opportunities, including:

- Educational offerings—including designation education
- Networking events
- Candidate/Advisor programs
- Seminars, luncheons, and chapter meetings
- Installation dinners and symposiums

Getting involved with your chapter is a great way to **build connections, stay informed, and advance your career.**

End of Document