AI Candidate Advisor Handbook

September 9, 2024

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Welcome to 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 assist in becoming 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 encourage Candidates in a positive and proactive manner.

What do Candidate Advisors do?

- ✓ **Contact**
- ✓ **Encourage and motivate**
- ✓ **Coach**
- ✓ **Monitor**
- ✓ **Guide**
- ✓ **Respond**
- ✓ **Support**

Contact
Candidate Advisors have **regular contact** with the Candidate via phone, email and/or in person.

Encourage and Motivate
Candidate Advisors encourage their Candidates to complete their final designation requirements and become Designated members, help Candidates create an action plan to meet their requirements within their Required Time Period, and motivate Candidates to manage their own learning.

Coach
Candidate Advisors coach Candidates through active listening, observation, and support.

Monitor
Candidate Advisor monitors a Candidate's progress and encourages them to complete requirements so they can become Designated members.

Guide
Candidate Advisors refer Candidates to appropriate resources, such as Appraisal Institute membership staff and information on the Appraisal Institute website.

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

Appraisal Institute is the world's leading organization of professional real estate appraisers. The organization has led the way in fostering and promoting the highest standards of practice through its designation programs, peer review process and education, research, and publishing endeavors.

Preparation for Becoming a Candidate Advisor

Educate yourself on the Candidate for Designation process so that you can effectively motivate your Candidate and foster a meaningful AI Advisor/Candidate relationship.

AI Designation Requirements

Current designation requirements (note: requirements for Candidate(s) may vary and can be viewed in your advisor portal). View requirements.

My Candidates for Designation (Advisor Portal)

On your AI login page, you will have a link to your Advisor Portal (in the righthand navigation menu). 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). View portal navigation video.

Fees Related to Candidacy

Admissions related fees for designation requirements such as Experience, Demo and Comp. This page also links to Designated Member Dues. View fees.

Candidate Policy 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. Candidate Policy Manual (PDF).

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What to Expect in the Beginning?

Upon reviewing this handbook, submitting the Advisor Agreement Form (PDF), and receiving approval from national, you will become active as a Candidate Advisor in the national database. We will make sure you are available to Candidates on the designation paths you have selected (i.e., MAI, SRA, AI-GRS, AI-RRS).

You will indicate how many Candidates you want and when this number is reached you will become invisible. You can become visible again if you have an available spot.

When you are selected, you—and the Candidate—will receive a pairing email with your contact information. The Candidate will then appear in your Advisor portal and your information will appear on the Candidate's designation checklist.

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

Help the Candidate create an action plan—When do they want to submit experience? Which Demonstration of Knowledge option is most appealing?

Tips on Designation Requirements

You might be asked many complex questions on designation requirements and answering to these questions might be complicated and could vary among Candidates, so your best response would be to refer them to AI Membership customerservice@appraisalinstitute.org or (888) 756-4624.

When advising a Candidate, your best resource is their checklist in your Advisor Portal. This personalized report contains the most updated and accurate path information for each Candidate.

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. View this guidebook (PDF).

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 the same skill set, but not every option is the right fit for every Candidate. Always refer to the appropriate guidebook for current options and guidelines. View General Demo Guidebook (PDF) or View Residential Demo Guidebook (PDF).

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 the Standards of Professional Practice. All assignments listed must have been performed for a business purpose (mock reports do not qualify). 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 those performed in the normal course of business and of a completed appraisal will qualify for submission. Reviews conducted for internal quality control, performed in the normal course of business, and meeting Standards for review, will qualify. Always refer to the appropriate guidebook for current options and guidelines. View this guidebook (PDF).

Required Time Period

"Required Time Period" shall mean the four (4) year period of time in which Candidates must complete the requirements for Designated Membership.

Maximum Length of Candidacy

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

If a Candidate fails to complete the requirements for designated membership within the Required Time Period, that individual may request to enter a new Required Time Period (if eligible). When a new Required Time Period is requested, the individual will be subject to Invalidation of Credit and Restoration of Credit. If that individual is no longer eligible for a new Required Time Period, such individual's Candidacy shall be terminated, and the individual will be entered into the Practicing Affiliate category.

Candidate Termination [Required Time Period]

If a Candidate fails to complete the requirements for membership within the Required Time Period and does not receive a new Required Time Period, the individual's Candidacy will be terminated. Candidates terminated for not receiving a new Required Time Period will be moved into the Practicing Affiliate category.

Invalidation of Credit

All credit that has previously been awarded toward a designation shall be automatically invalidated for a Candidate whose candidacy is terminated for any reason.

Restoration of Credit

Candidates are subject to the requirements in effect on the date of admission or readmission to the Candidate program, as modified from time to time. A Candidate will receive credit for designation requirements completed within twenty (20) years prior to his or her most recent application for Candidacy with the exception of the Comprehensive Examination, the Degree Requirement, the Appraisal Institute Business Practices and Ethics Course and the Standards Course. Such individual will receive credit for the Business Practices and Ethics Course and the Standards Course and/or examination taken and passed within four (4) years prior to his or her most recent application for Candidacy.

Note: Comprehensive exam modules and degree submissions are automatically restored upon readmission.

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

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

What you CAN see

- Required Time Period
- Candidate checklist (designation requirements completed and outstanding)
- Candidate(s) directory information via Find an Appraiser.
- Candidate's name, email address and phone number.
- Email notification when a Candidate receives a new Required Time Period
- Status of candidacy (active, suspended or terminated)
- Email notification if a Candidate becomes terminated

What you CANNOT see

- Candidate AI education transcript
- Candidate *pass or fail* email notification for designation requirements
- Reason for the suspension or termination of Candidate

Things to remember

- Suspensions for nonpayment of dues occur in June
- Terminations for nonpayment of dues occur in September

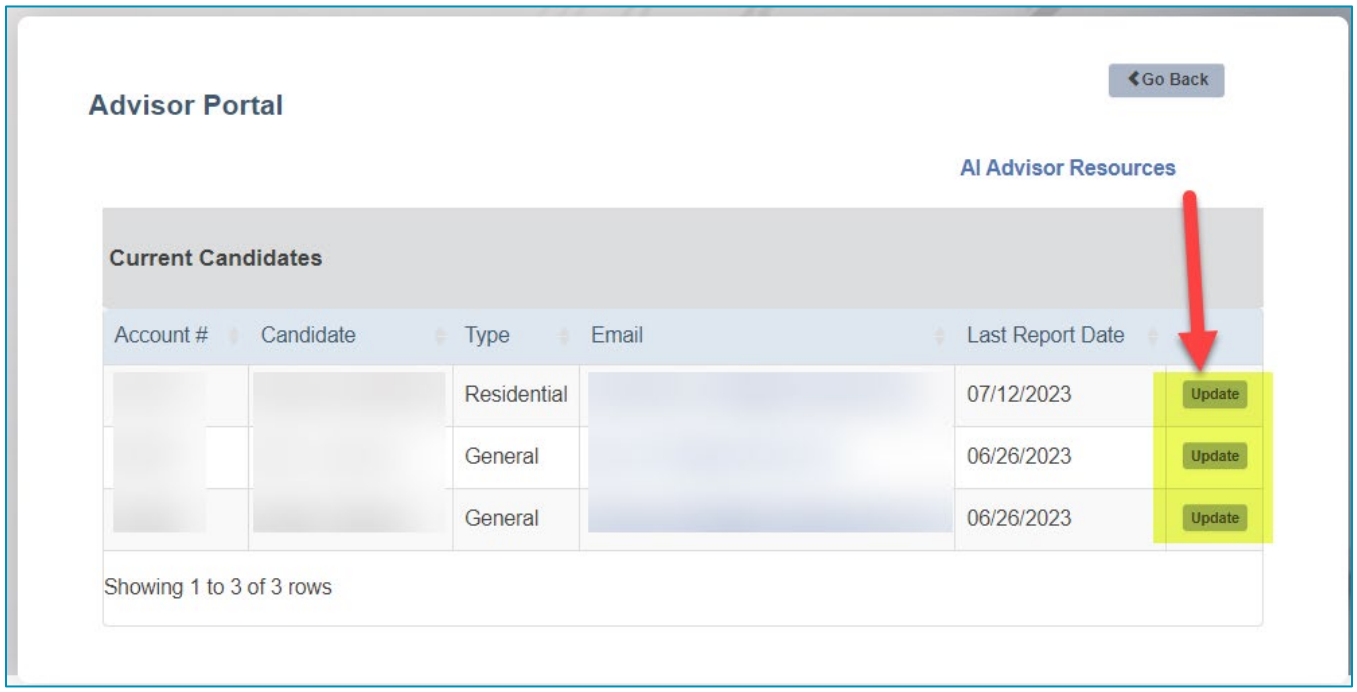
Recording Candidate Contact (Recommended)

We **highly recommend** logging/recording contact you make with your Candidate(s).

In your AI login page, you will find the **Advisor Portal** in the navigation list on the right.

You will see an **Update** button next to each Candidate assigned to you. Click the button to update comments or view comment history (*confidential*, Candidate does **not** see these notes).

This is where you will also access checklist of designation requirements, Required Time Period, 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.

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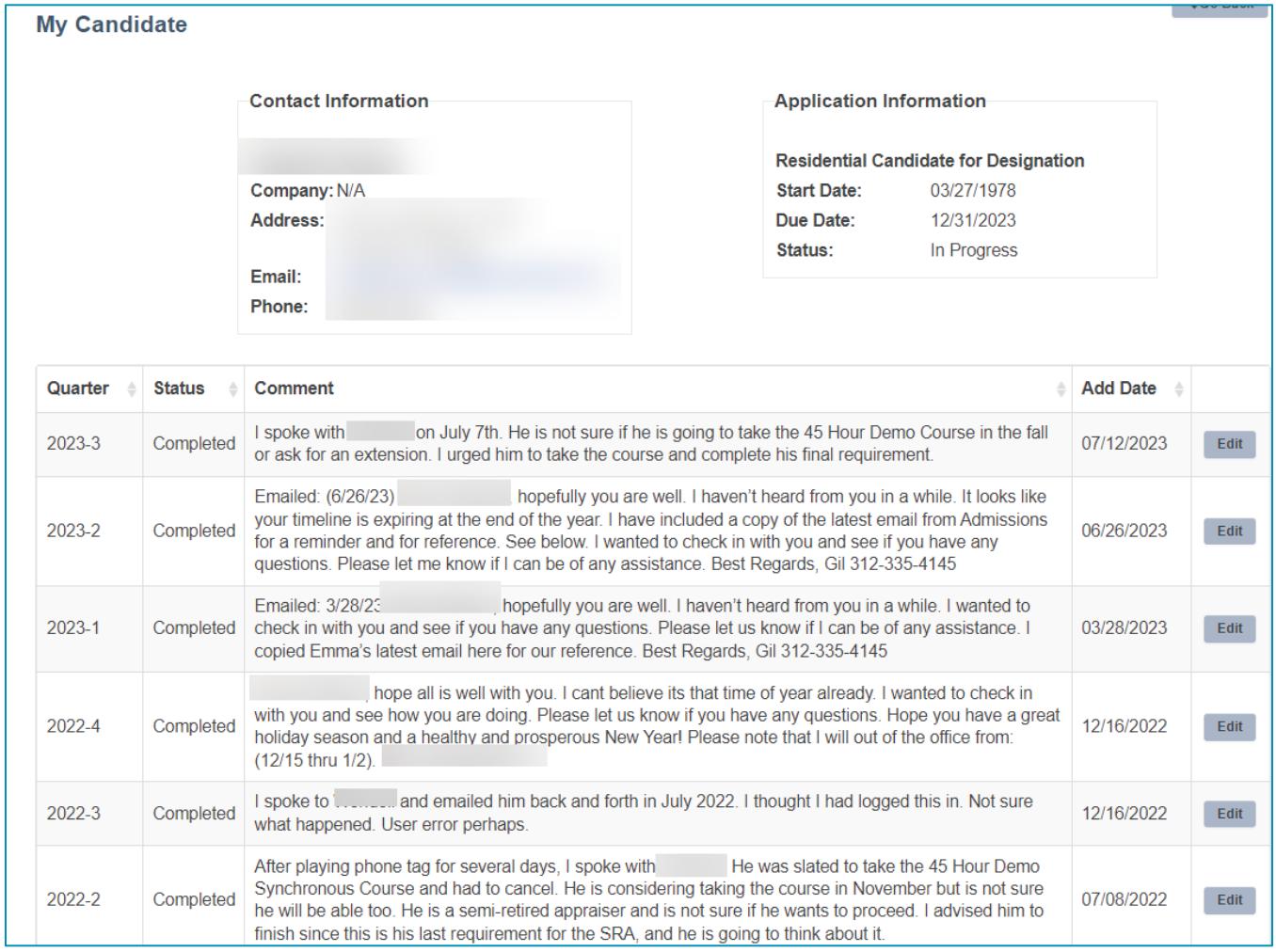
Quarterly contact and the recording of it is **recommended** for Candidate Advisors.

Contact doesn't need to be a discussion or a meeting; you can drop a quick e-mail or leave a voicemail.



My Candidate

Contact Information

Company: N/A
Address:
Email:
Phone:

Application Information

Residential Candidate for Designation
Start Date: 03/27/1978
Due Date: 12/31/2023
Status: In Progress

Quarter	Status	Comment	Add Date	
2023-3	Completed	I spoke with on July 7th. He is not sure if he is going to take the 45 Hour Demo Course in the fall or ask for an extension. I urged him to take the course and complete his final requirement.	07/12/2023	Edit
2023-2	Completed	Emailed: (6/26/23) hopefully you are well. I haven't heard from you in a while. It looks like your timeline is expiring at the end of the year. I have included a copy of the latest email from Admissions for a reminder and for reference. See below. I wanted to check in with you and see if you have any questions. Please let me know if I can be of any assistance. Best Regards, Gil 312-335-4145	06/26/2023	Edit
2023-1	Completed	Emailed: 3/28/23 , hopefully you are well. I haven't heard from you in a while. I wanted to check in with you and see if you have any questions. Please let us know if I can be of any assistance. I copied Emma's latest email here for our reference. Best Regards, Gil 312-335-4145	03/28/2023	Edit
2022-4	Completed	, hope all is well with you. I cant believe its that time of year already. I wanted to check in with you and see how you are doing. Please let us know if you have any questions. Hope you have a great holiday season and a healthy and prosperous New Year! Please note that I will out of the office from: (12/15 thru 1/2).	12/16/2022	Edit
2022-3	Completed	I spoke to and emailed him back and forth in July 2022. I thought I had logged this in. Not sure what happened. User error perhaps.	12/16/2022	Edit
2022-2	Completed	After playing phone tag for several days, I spoke with He was slated to take the 45 Hour Demo Synchronous Course and had to cancel. He is considering taking the course in November but is not sure he will be able too. He is a semi-retired appraiser and is not sure if he wants to proceed. I advised him to finish since this is his last requirement for the SRA, and he is going to think about it.	07/08/2022	Edit

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Frequently Asked Questions (FAQs)

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

It means you have reviewed the Candidate Advisor Handbook and have signed and submitted the AI Advisor Agreement Form, 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 eabraham@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 Candidate 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 eabraham@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?

They will no longer be paired with you, and it will free up **one** spot in your availability.

If you no longer want to accept any additional Candidates, please let staff know immediately by emailing eabraham@appraisalinstitute.org.

If you know in advance that you no longer want to serve as a Candidate Advisor once your Candidate(s) are designated, please let us know immediately so we can update your account.

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 AI Membership so they may communicate with a counselor who will inform them of their options.

AI Continuing Education Credit

You can earn **AI Continuing Education Credit** (up to 125 points per AI CE cycle) for service as a Candidate Advisor.

You will need to log it in through self-reporting continuing education in your AI Continuing Education checklist. Learn more in the AI CE Overview (PDF).

Advisor Agreement Form

Now that you know more about the Candidate Advisor Program and process, we hope you will want to serve as an AI Candidate Advisor. To get started, please complete the Advisor Agreement Form (PDF) and email it to eabraham@appraisalinstitute.org.

Once approved you will be added to the Advisor Directory and will have the opportunity to serve as an Advisor to Candidates for Designation with the Appraisal Institute.

Contact

Emma Abraham, Membership Program Manger
P: (312) 335-4288
E: eabraham@appraisalinstitute.org

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