

# OKLAHOMA REAL ESTATE APPRAISER BOARD

400 NE 50<sup>th</sup> St.

Oklahoma City, Oklahoma 73105-1816

## REPORT OF SUPERVISORY RELATIONSHIP

### ADDITION OF SUPERVISOR

I hereby certify that I am a state certified residential or state certified general appraiser meeting the required qualifications for a supervisory appraiser as promulgated by the Oklahoma Real Estate Appraiser Board in OAC 600:10-1-16(d). I agree to supervise the appraiser trainee named on this form. I understand that I am responsible to the public and to the Board for the professional actions of this person. I agree to have the trainee perform appraisal activity only under my active, personal and diligent supervision and direction. I understand that I am required to maintain workfiles as required by USPAP and 59 O.S. § 858-729, and that the trainee appraiser is entitled to obtain copies of reports of all appraisals in which the trainee appraiser participated. I will notify the Board immediately when supervision of this individual has terminated.

Supervisory appraiser's name (typed or printed): \_\_\_\_\_

Supervisor's certificate number: \_\_\_\_\_ Expiration Date: \_\_\_\_\_

Supervisor's signature: \_\_\_\_\_ Date signed: \_\_\_\_\_

### TERMINATION OF SUPERVISOR

I hereby certify that my supervision of the trainee listed below is terminated. I am no longer responsible for the professional actions of this individual. I understand the trainee appraiser is entitled to obtain copies of all reports of appraisals in which the individual participated.

Supervisory appraiser's name (typed or printed): \_\_\_\_\_

Supervisor's certificate number: \_\_\_\_\_ Expiration Date: \_\_\_\_\_

Supervisor's signature: \_\_\_\_\_ Date signed: \_\_\_\_\_

### STATEMENT OF TRAINEE APPRAISER

I hereby acknowledge the above and foregoing statement of the supervisory appraiser. I understand that I am required to maintain appraisal log recording information regarding all appraisal activities. I have read and am familiar with the provisions of OAC 600:10-1-16.

Trainee appraiser's name (typed or printed): \_\_\_\_\_

Trainee's certificate number: \_\_\_\_\_ Expiration Date: \_\_\_\_\_

Trainee's signature: \_\_\_\_\_ Date signed: \_\_\_\_\_

### **600:10-1-16. Supervision of Trainee Appraisers**

- (a) Trainee Appraisers shall report to the Board, on a form prescribed by the Board, the identity of any supervisory appraiser. Trainee Appraisers may have more than one supervisory appraiser. When a Trainee Appraiser has more than one supervisory appraiser, each shall be reported to the Board as indicated above.
- (1) The supervisor-trainee relationship shall become effective on the date of receipt of the original required form with original signatures in the administrative office of the Board.
- (2) A supervisory appraiser shall notify the Board in writing immediately when supervision of a Trainee Appraiser has been terminated by the supervisory appraiser or the Trainee Appraiser.
- (b) Trainee Appraisers shall maintain an appraisal log on a form prescribed by the Board. Separate appraisal logs shall be maintained for work performed with each supervisory appraiser. This appraisal log shall record the following information:
- (1) Client name and date of report,
- (2) Address or legal description of the real property appraised,
- (3) Description of the work performed by the trainee appraiser and the scope of review and supervision of the supervisory appraiser,
- (4) Number of actual hours worked,
- (5) Type of property appraised,
- (6) Form number or description of report rendered, and
- (7) The signature and state certificate number of the supervisory appraiser.
- (c) Experience credit for the purpose of upgrading will not be given unless:
- (1) a properly completed trainee-supervisory report form is on file in the administrative office of the Board, and
- (2) the Trainee Appraiser either signs the certification required by Standards Rule 2-3 of the Uniform Standards of Professional Appraisal Practice, or the supervisory appraiser gives credit to the Trainee Appraiser in the certification and complies with the requirements of Standards Rule 2-2(a)(vii), 2-2(b)(vii), or 2-2(c)(vii) as applicable.
- (d) Both supervisory and trainee appraisers shall maintain complete work files as required by the Uniform Standards of Professional Appraisal Practice and the Oklahoma Certified Real Estate Appraisers Act.
- (e) A supervisory appraiser shall meet the following requirements:
- (1) be a State Certified General Appraiser or a State Certified Residential Appraiser on a credential issued by the Board for a period of at least three years;
- (2) be in good standing with the Board and not have been subject to any disciplinary action with any jurisdiction within the last three years that affects the supervisory appraiser's legal eligibility to engage in appraisal practice.
- (3) accept responsibility for training, guidance, and direct supervision of the Trainee Appraiser by signing the form referenced in (a), above.
- (4) must successfully complete a Board-sponsored course for trainees and supervisors; provided however, that supervisors in place as of the effective date of this rule must successfully complete this course within one (1) year following the effective date of this rule.
- (5) supervisory appraisers must comply with the COMPETENCY RULE of USPAP for the property type and geographic location
- (f) A supervisory appraiser shall:
- (1) accept responsibility for a Trainee Appraiser's appraisal reports by signing each report and certifying that the report is in compliance with the Uniform Standards of Professional Appraisal Practice, and
- (2) personally inspect each appraised property with the Trainee Appraiser until the supervisory appraiser determines that the Trainee Appraiser is competent, in accordance with the Competency Rule of the Uniform Standards of Professional Appraisal Practice, for the property type.
- (g) A supervisory appraiser shall notify the Board immediately when supervision of a Trainee Appraiser has been terminated by the supervisory appraiser or the Trainee Appraiser.
- (h) Prior to assuming duties as a supervisory appraiser, an appraiser who has been disciplined by the Board must receive approval from the Board.
- (i) A supervisory appraiser may assume responsibility for more than three Trainee Appraisers under the following terms and conditions:
- (1) The supervisor must apply for authority to supervise more than three Trainee Appraisers with the Board on forms approved by the Board for this purpose. This approval shall extend to the supervisor or supervisors, the facility and the training plan. Any approval issued hereunder shall specify a maximum number of trainees authorized.
- (2) The supervisor must specify the location of the facility to be used for this purpose, which may not be a residence. The facility must have posted hours, approved by the Board, during which the facility will be open and a qualified supervisor present. During the operating hours, the facility and all records specified herein shall be subject to unannounced compliance inspection by a representative of the Board.
- (3) The supervisor must prepare a training plan, based on the Core Curriculum and the Real Property Appraiser Body of Knowledge promulgated by the Appraiser Qualification Board of The Appraisal Foundation, appropriate to the level of licensure to which the trainee aspires and for which the supervisor is qualified. This training plan should, as a minimum, include learning objectives for the experience to be gained, a planned time line for further qualifying and continuing education required to bring the trainee to a fully qualified status, and a checklist for monitoring progress by the trainee toward meeting these objectives.
- (4) Records maintained in the training facility must include the training plan, an appraisal log, a work file for each appraisal assignment, and a progress checklist, each maintained on a contemporaneous basis, for each Trainee Appraiser. In addition, appropriate reference materials should be on hand, which must include the current edition of the USPAP.
- (5) Approval of any supervisor or supervisors under this paragraph may be conditioned upon an interview of such supervisors by a representative of the Board.
- (j) Trainee appraisers must successfully complete a Board-sponsored course for trainees and supervisors; provided however, that trainee appraisers credentialed as of the effective date of this rule must successfully complete this course within one (1) year following the effective date of the rule.