

Tip Sheet for EASy Advisors

Role of Advisor

Advisors are volunteers who are assigned to Applicants to answer questions about Endorsement® and to assist Applicants throughout the submission process. Efforts are made to match advisors with Applicants who live and work within the advisors' regions or communities. Advisors and Applicants may have an existing relationship. However, assigning an Advisor who has a supervisory relationship with and/or who will be expected to complete a reference rating for this Applicant is strongly discouraged. **Ideally**, each Advisor will work with one or two Applicants at a time.

The primary responsibility for completion of the application lies with the **Applicant**. However, it is the intent of the association to support each Applicant throughout the process; therefore, outreach by the advisor as described below is important. The advisor does not have training or supervisory responsibilities. The role is a collegial one.

Qualifications for Advisors:

1. Currently Endorsed at or above the level of assigned Applicants
2. Knowledgeable about the Endorsement® process and EASy
3. Committed to the process and Advisor role

Advisor Tasks:

Endorsement Advisors have 6 primary tasks:

1. **First, Advisors are expected to make the initial contact** with the assigned Applicant by e-mail, phone, or the EASy comment windows in order to introduce yourself and welcome him/her to the Endorsement® process. We ask that the first contact be made within 2 weeks of your notification of the assignment. The Applicant will know your name as you will be listed as their Advisor on the dashboard of their Endorsement® application. You will receive notification of the Applicant assignment via an email from EASy and you may also receive an email from your state IMH association's Endorsement Coordinator. The email from EASy will include the Applicant number and a link to follow which will direct you to the corresponding application within EASy. The assignment will also show up on your dashboard under the Assigned Apps tab. During the initial contact, ask the Applicant to communicate with you when he/she updates his/her EASy application so you can read and provide guidance to be sure descriptions of specialized experiences are clear and complete.
2. **Second, Advisors are expected to be available to answer questions about the application process**, competencies, preparation of the EASy application, fee structure, and written exam, as appropriate to the level for which the Applicant is applying. Applicants are encouraged to use the EASy comment windows to ask questions.

3. **Third, Advisors are expected to be in contact with the Applicant by telephone, e-mail, in person, or via EASy messaging at least 3 times** during the Endorsement® application process to assist the Applicant in completing in a reasonable time period

4. **Fourth, Advisors are expected to review the application with the Applicant** (by email, telephone, or via EASy comment windows) before the Applicant submits. With the Applicant, look through each section of the Endorsement application and utilize The Getting Started Guide to ensure that all of the necessary competencies have been covered, with particular attention to the Training section. The Getting Started Guide is emailed to all new applicants by the Endorsement Coordinator immediately after they register on EASy. It is recommended that the Advisor ask the Applicant to send his/her completed Getting Started Guide to the Advisor so this task can be done collaboratively.

5. **Fifth, Advisors are expected to identify the Applicant's strengths and any areas where the Applicant may require additional specialized in-service training and/or reflective supervision related to the competencies.** If the Advisor has concerns about an Applicant's readiness to earn Endorsement® at the level at which he/she has applied, those concerns should be discussed with the Applicant. Whenever possible, the use of the relationship developed between advisor and Applicant can be used to support the Applicant in developing a plan to address any gaps. With expressed permission from the Applicant, an Advisor can seek support from the Endorsement Coordinator regarding how best to address concerns with an Applicant

6. **Sixth, Advisors are expected to establish a relationship-focused Endorsement® application experience and process.** The advisor provides support and encouragement when the applicant experiences negative feelings (i.e. frustration, worry, fear, etc.) regarding the application process. The Endorsement process has been described as a journey, not a race. It takes time to demonstrate competency in all of the areas outlined by the Competency Guidelines. Through the use of his/her relationship with the Applicant, the Advisor can share insight into the journey of Endorsement.

How to log into EASy and set-up Preferences:

- Log in using the username and password sent to you by the EASy system; if you are already an EASy user, your username and password will be the same. There is only one login for EASy
- Upon your very first log in, you will be asked to electronically "sign" a Confidentiality Statement; this ensures that you will keep the contents of the Applicant's Endorsement application confidential

- To change your password, go to Edit Profile button in upper right corner and click on “update password”
- To set Alert preferences, the Advisor must log in and go to Edit Profile. From here, they can elect to receive system alerts by Email or In Application
- It is strongly recommended that the Advisor elect to receive In-Application alerts¹ for all categories and they are also recommended to elect to receive email alerts. This ensures that the Advisor will not miss communication about the Endorsement® Application. Most Advisors elect to receive both In-Application and Email alerts
- These alerts will notify you when the status of an application has been updated (e.g., when Applicant Submits); when an Applicant posts a comment; when Reference Ratings are completed; and when Transcripts are uploaded. Along the top of the page, you will see a number next to the word Alerts, indicating how many new alerts there are since the last time you logged in
- Applicants are encouraged to use the EASy comments windows to ask questions. The EASy comments windows appear in the Education, Work, Training, References, and Transcripts sections and allow the Advisor to post a date and time stamped response to the Applicant’s question. Administrator can also reply to EASy Comments from Applicant and Advisor

How to Review an Applicant’s Application in EASy:

- Once logged in, you’ll see a list of Applicants that have been assigned to you under “Assigned Apps”. Click on the arrow just to the left of the Applicant name to open his/her application and to begin a review
- You may notice comments/questions/responses to questions that have been posted by the Applicant in the EASy comments section under the Education, Work, Training, Supervision, and Transcripts tabs
- As the Advisor, when you have questions or comments for the Applicant, utilize the EASy Comments box to send and receive messages with the Applicant
- The history of the correspondence may be helpful to you as you are reviewing entries in each of these tabs
- As long as you save as you go, you can log out and then back in as many times as necessary to complete a review
- If you have not saved for several minutes, the system will log you out and you may lose comments. Save early & often!
- Definitions of what is required are listed at the top of each section
- You can begin at the Agreement and Ethics tabs. Confirm that the Applicant has agreed to each

Education

¹ In-application alerts show up on the Administrator’s dashboard and therefore require being logged in and checking frequently.

- Check that the Applicant has been out of school long enough to meet the “post-degree” paid work criteria (e.g., if applying for II, did they earn at least a Bachelor’s degree at least two years ago?)
- If you have questions or comments for the Applicant, utilize the “Comments” box to send and receive messages with the Applicant

Work

- Carefully read the description of each job. Does the narrative clearly meet the specialized work experience criteria (found at the top of the page)?
- This section is often the trickiest for Applicants. Descriptions found in resumes and job postings are often inadequate to determine if specialized work criteria is met. Most applicants will need prompting to provide a description that makes clear that the Applicant’s experience is a fit for the desired Endorsement
- If you have questions or comments for the Applicant, utilize the “Comments” box to send and receive messages with the Applicant

Leadership (for IV Applicants only)

- Carefully read the description of each leadership experience. Do the narratives clearly fit in with one or more of the described leadership possibilities (found at the top of the page)?
- Additionally, the Applicant may state, “See Resume” rather than listing all of the leadership activities. In that case, carefully read the Applicant’s resume to learn of leadership experiences. The Applicant’s resume can be found within the Details section of his or her application
- If you have questions or comments for the Applicant, utilize the “Comments” box to send and receive messages with the Applicant

Training

- For each session listed, consider the trainer, the sponsor, and the number of hours. The training should be relevant to at least one of the knowledge/skill areas of the competencies
- It is recommended that applicants include a brief description of the training content and/or objectives in the ‘notes’ section if the training content is not clear from the title of the training
- Review the knowledge/skill areas that the Applicant indicated were met. Rule of thumb is one knowledge/skill area for each hour of training
- Has the Applicant attended the minimum number of training hours required?
- If you have questions or comments for the Applicant, utilize the “Comments” box to send and receive messages with the Applicant

Supervision

- Required for II, III, and IV-Clinical. Optional for all others

- Is the provider of reflective supervision/consultation Endorsed at the appropriate level? If not, has the association vetted the provider as qualified?
- Do the total number of hours meet the minimum required?
- Were the minimum number of hours accrued over a period of time that was at least one year and not more than two years?
- Were the hours accrued while providing qualifying work experience?
- Did the Applicant write a thorough description, which clearly describes the nature of reflective supervision/consultation?
- If you have questions or comments for the Applicant, utilize the “Comments” box to send and receive messages to the Applicant

References

- Advisors are unable to view the content of completed Reference Rater forms
- Check that the Applicant has sent Reference Rater forms to at least 3 references
- Review, through conversation with the applicant, that there is a rating from a) reflective supervisor/consultant, b) program supervisor (person to whom Applicant currently reports), c) supervisee, if the Applicant provides reflective supervision to others and/or d) colleague, teacher, trainer, or other who is familiar with the Applicants work as it relates to the competencies
- If none of the reference raters are Endorsed, has at least one been vetted and approved by the IMH association?
- References are only good for one year
- If you have questions or comments for the Applicant, utilize the “Comments” box to send and receive messages to the Applicant

Transcripts

- Review that ALL transcripts are uploaded for every school Applicant has attended. Official transcripts are required from each college/university, even if a degree was not earned at that institution
- An applicant can choose to share their transcripts with an Advisor to consult about which course or courses cover areas of competency, however, they cannot do this through the EASy system
- If you have questions or comments for the Applicant, utilize the “Comments” box to send and receive messages to the Applicant

Submit

When an Advisor has reviewed the application, with the Applicant, and agreed the application is ready to Submit, the Applicant can Submit his or her Endorsement@ application.