

2010 MCLE Provider Renewal Application Helpful Hints

In reviewing applications of providers who are renewing their provider status, here are some of the ongoing problems or concerns that often delay the review and/or processing of your applications, and sometimes are a cause for the return of your application:

1. **Failure to list four “eligible activities.”** The activities given must be on dates of four different courses that occurred within two years prior to the date you are due to renew.
2. **Incorrect calculations of MCLE hours.** The calculation of hours for MCLE credit for California members is based on 60 minutes of legal education instruction to equal one hour of MCLE credit. Legal education is the actual length of time devoted to an acceptable legal education topic.

Members **DO NOT** receive MCLE credit for the following parts of a course presentation:

- A. Registration, Vendor Exhibits, Demonstrations
- B. Scheduled breaks or rest periods
- C. Mealtime presentations that do not indicate the actual length of the speaker’s presentation
- D. Any marketing topic relating to advertising to promote the firm or the attorney’s services; getting, gaining, or obtaining new clients, ways to increase the firm’s income, etc.
- E. Non-legal functions including: Business or Company meetings, Networking, Receptions, Entertainment, Tours, Evaluations, and Certificates & Award Ceremonies

Members **DO** receive MCLE credit for the following parts of a course presentation:

- A. Welcome, opening remarks & introduction of speakers
- B. Closing Remarks, Questions & Answer Period
- C. Self-Assessment Tests (must be timed)

3. **Failure to provide clear and adequate descriptions of subfield credit(s).**

- A. **Legal Ethics:** Description or supporting material must focus on the Rules of Professional Conduct for attorneys with a reference to the Codes (if possible), and may not focus on business or corporate ethics, federal or governmental ethics, or ethics in general.
- B. **Bias:** Content of the program must focus on interactions between attorneys in a legal setting or in the courtroom among jurors, investigators, the judges, witnesses, or other participants in a legal situation that are not a part of the public/spectator audience.
- C. **Substance Abuse/Mental Illness:** Programs with substance abuse content must focus on the “prevention, detection and treatment” of substance abuse for attorneys or as it affects their clients and others in society. Mental Illness programs (as an option to substance abuse) must focus on types of disorders that impair the “professional competence of the attorney’s ability to apply sufficient learning, skill and diligence necessary to discharge duties arising from employment or provision of legal services.”

4. **Programs that relate to “Law Practice Management”** may apply toward “general MCLE credit” when the program focuses on the higher academic and practical education of the attorney and may NOT focus on basic subjects with content that can be directed to any other audience who are non-attorneys.
5. **Renewals submitted without the appropriate filing fee.** Applications and payment should be submitted together. Loose checks may easily be mis-routed, returned, or not applied to your renewal application.
6. **Failure to indicate a time schedule for the Audit Activity.** If the activity is only one hour, the start and end time should be indicated, either on the attendance record or on an attachment. For activities lasting longer, especially in a two –three day conference or a day-long seminar event, the agenda must agree with the total hours of MCLE credit. To reduce confusion that causes further delay in the review process, the appropriate sessions on which MCLE credit is given may be highlighted on any program agenda, brochure, flyer, etc. that is attached with the renewal application for review. Part of the review process is to verify the total hours. More importantly, we need to feel certain that providers are calculating the hours correctly, and giving members the correct amount of credit. Note: Concurrent sessions are counted only once.



THE STATE BAR OF CALIFORNIA
 Office of Admissions • MCLE Providers
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\$300 Rec'd: YES NO
 Rec'd by: _____
 Application #: _____
 Date Rec'd: _____

date stamp here

 STATE BAR OF CALIFORNIA USE ONLY

2010 MCLE Multiple Activity Provider Renewal Application

You must have offered at least four (4) separate and different activities between January 1, 2008 and December 31, 2009. If you have not offered at least four activities, **DO NOT** submit this application. You will need to reapply for Multiple Activity Status after you qualify.

\$300 FEE FOR 3 YEARS
Due January 4, 2010

1) PROVIDER CONTACT INFORMATION

If you do not know your Provider number, please go www.calbar.ca.gov and click on the following links:
 MCLE > Provider Information > Provider Search

Provider Number: _____
 Provider Name: _____
 Provider Address: _____
 City: _____ State: _____ Zip: _____
 Contact Name: _____
 Provider Phone : (_____) _____ Provider Fax: (_____) _____
 Provider Website (optional): _____
 Provider E-mail (posted on State Bar website): _____
 Contact Email (not posted on website): _____

2) PROVIDER AFFILIATIONS

Are there any other offices, departments, divisions or other entities for which provider will assume responsibility?

No (Provider assumes no affiliate responsibilities)
 Yes (list affiliates or attach a list) Affiliate: _____
 Affiliate: _____ Affiliate: _____

3) ELIGIBLE ACTIVITIES LIST

List the dates and activity titles of four (4) separate and different activities held between January 1, 2008 and December 31, 2009. Listed activities must comply with Title 3, Division 5 of the *Rules of the State Bar of California (MCLE Provider Rules)*.

Date(s): _____ Activity Name: _____
 Date(s): _____ Activity Name: _____
 Date(s): _____ Activity Name: _____
 Date(s): _____ Activity Name: _____

**ACTIVITY AUDIT for
2010 MCLE Multiple Activity Provider
Renewal Application**

Complete this activity audit for one of the activities listed on page 1, section 3

Provider Name: _____ Prov. #: _____

Activity Name: _____

Activity Date(s): _____ Activity Location (city, state) _____

Activity Format (check one or both): Self-Study Participatory

Total MCLE credit hours for this activity: _____, including _____ hours of *Legal Ethics*,
_____ hours of *Elimination of Bias*, and _____ hours of *Substance Abuse/Mental Illness*.

Provide a short summary of the content of the activity: _____

Provide a short summary to support any credit hours claimed for *Legal Ethics*, *Elimination of Bias* or *Substance Abuse/Mental Illness*: _____

List of Speakers at Activity:

<u>Name</u>	<u>Title and Qualifications</u>
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Attach the following three (3) items to this application:

- (copy of) Agenda for the activity listed above
- (copy of) Record of Attendance for the activity listed above
- (copy of) Printed or Electronic Advertisement (if done) for the activity listed above

Provider Name: _____ Prov. #: _____

Submission Checklist

Please indicate, by placing a check mark in the box next to the item, that the following are included in this application or have been verified:

- \$300 check, made payable to the "State Bar of California", is enclosed
 - Four separate and different Activities are listed in Section 3 of Page 1
 - Activity detailed on Page 2 is listed in Section 3 of Page 1
 - Copy of Agenda for the Activity listed on page 2 is enclosed
 - Claimed MCLE Activity credit hours correspond to times on Agenda
 - Copy of Record of Attendance for the Activity listed on page 2 is enclosed
 - Copy of Printed or Electronic Advertisement (if done) for the Activity listed on page 2 is enclosed
 - Application is dated and has an original signature (section below)
-

Provider acknowledges that its approved provider status may be revoked for non-compliance with Title 3, Division 5 of the *Rules of the State Bar of California (MCLE Provider Rules)* and amendments thereto, or for failure to comply with the agreements and certifications contained in this form. Provider acknowledges that its approved provider status extends to those of its affiliates, offices, departments, divisions or other entities which provider has listed on Page 1, Section 2 of this application and agrees to actively monitor and publicly assume responsibility for ensuring compliance with the *MCLE Provider Rules*. Provider agrees to comply with all other rules applicable to providers of Continuing Legal Education that are promulgated by the State Bar of California. If provider uses promotional materials for activities held after December 31, 2009, but prior to approval of provider renewal, provider agrees to specify in all such materials that application for renewal of provider status is pending, and to advise all participants as soon as possible whether or not renewal of provider status has been granted.

I have read the foregoing renewal and any attachments to it and know the contents thereof, and the same are true of my own knowledge. I declare, under penalty of perjury, under the laws of the State of California, that the foregoing and any attachments to it are true and correct.

Signature: _____ Date: _____

Print Name: _____ Title: _____