

MCLE Multiple Activity Provider Renewal Helpful Hints

For your information and assistance in having your application approved, please review each of the following issues and potential deficiencies that may delay its approval or result in it being returned to you to correct a deficiency:

1. **Failure to list four “eligible activities.”** The MCLE activities submitted must each have different educational content and must have been offered within at least two years prior to the date your status is set to expire.
2. **Incorrect calculation of credit given.** The calculation of each hour (or fractions thereof) of MCLE credit given to licensed California attorneys must be based upon a 60-minute hour of legal education or instruction. Legal education is the actual length of time devoted to an acceptable and approved educational subject.

Licensed members **MAY NOT** receive (and Providers must not offer) any MCLE credit for any of the following:

- A. Time needed to register for an event, or time spent viewing vendor exhibit or demonstrations;
- B. Scheduled breaks, rest periods, or time spent consuming meals or time attending receptions;
- C. Meal presentations without any approved legal content or that fail to indicate the actual length of the speaker's presentation;
- D. Time devoted to marketing or to advertising or promote a law firm or the attorney's services; finding new clients, methods of increasing the revenue or profit associated with the practice or law;
- E. Any non-legal function such as business meetings, networking events, entertainment or tours, or time spent preparing evaluations or used to issue certificates, awards or professional recognition.

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

- A. The opening remarks and introduction of speakers.
- B. Closing remarks, question & answer periods;
- C. Self-assessment tests (must be timed)

3. **Failure to provide a clear, concise and meaningful description for credit given for any MCLE subfield.**

- A. **Legal Ethics:** Any program offering such credit must describe the educational content and the supporting materials that confirm that it offered attendees a discussion of the California Rules of Professional Conduct, or the ABA Model Rules, along with reference to any other statutory or case authority that discussed the ethical practice of law in California. Credit may not be given for any content that was focused on judicial ethics, business or corporate ethics or societal ethics in general. (Programs providing legal ethics education in the use of social media maybe worthy of credit; programs offering advice in the use of social media for purposes of marketing are not credit-worthy.)
 - B. **Recognition and Elimination of Bias:** A program offering such credit must offer meaningful education in the recognition, identification and prevention of bias found in the legal profession and/or society.
 - C. **Competence Issues:** A program offering such credit must offer education in substance abuse or other mental or physical issues that impair a member's ability to practice law with competence. Credit must not be given for programs that offer help or instruction in treating alcohol and substance abuse or a mental or physical condition through yoga, meditation, therapy or other forms of “stress relief.”
4. **Programs regarding “Law Practice Management”** General MCLE may be offered if the activity provides education or practical instruction in the practice of law, litigation or the management of a solo law practice, law firm or corporate legal department, the ethical management of client trust accounts, law firm finances and attorney-client communications, case management, effective calendaring and the avoidance of malpractice.
 5. **Renewals submitted without the appropriate filing fee** Each application and its payment must be submitted together. Separate checks are easily misrouted, returned or not applied to your renewal application. For those who wish to pay by credit card, a fillable Credit Card Payment Form is available on the State Bar's website.
 6. **Failure to identify the basis for MCLE** For any activity described in your renewal application, each activity of one hour or less must list its start/end times on the Record of Attendance. For activities or programs offered during half-day or multi-day events, each session and its credit must be identified so that the total number of hours of MCLE credit given can be verified. All sessions for which MCLE credit is given must be adequately described in any program, agenda or brochure prepared for the verification of both the complete substance of each activity and the total number of hours of MCLE credit given. Thus, for an application to be approved, all hours of credit given must be adequately identified, described and counted. **Please note:** Credit for concurrent MCLE sessions are to be counted only once since members attending are able to attend only one session at a time.



THE STATE BAR OF CALIFORNIA
 Office of Admissions • MCLE Provider Certification
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 (415) 538-2126 • providers@calbar.ca.gov

\$300 Rec'd: YES NO
 Rec'd by: _____
 Application # _____
 Date Rec'd _____

STATE BAR OF CALIFORNIA USE ONLY

\$300 FEE FOR 3 YEARS

Due January 2, 2017

**2017 MCLE Multiple Activity
 Provider Renewal Application**

You must have offered at least four (4) separate and different activities between January 1, 2015 and December 31, 2016. 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.

1) PROVIDER CONTACT INFORMATION

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, 2015 and December 31, 2016. 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
2017 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 *Competence*.

For all activities offered that are one hour or more in length, are substantive written materials available to attendees: Yes No

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 *Competence*:

List of speakers at activity:

Name

Title and Qualification

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
- (copy of) Substantive Written Materials

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" / Credit Card Payment Form 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
- Copy of Written Materials 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
- 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, 2016, 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: