

INFORMATION FOR NEW CLE SPONSORS

We hope that the following information will answer your questions regarding the application, evaluation and attendance reporting procedures for CLE sponsors. If you have further questions regarding MCLE accreditation or the MCLE program, please contact the MCLE Department at 1 (800) 204-2222, ext 1806, or at mcle@texasbar.com.

GENERAL INFORMATION

The purpose of MCLE (Article XII, State Bar Rules) is to ensure that every active member of the State Bar of Texas pursues a plan of continuing legal education throughout his or her career in order to remain current on the law in our rapidly changing society. *Accreditation Standards for CLE Activities* have been adopted by the MCLE Committee to provide guidance in determining accreditation under Section 4(A) of Article XII, State Bar Rules. Programs that meet the criteria outlined in the Accreditation Standards are approved for MCLE credit. Programs that target an audience of non-attorneys and/or cover non-legal topics or skills may not be approved for MCLE credit under these standards.

The most current version of the *Accreditation Standards for CLE Activities*, along with the *Application for Accreditation of CLE Activity* and The MCLE Rules and Regulations are posted on our website, www.texasbar.com/mcle.

The MCLE Department receives and processes approximately 23,000 applications for accreditation each year. Applications that are received with all required information and fees are processed in the order that they are received with evaluation and notification occurring within 2-4 days of receipt. Incomplete applications are pended and processed only upon receipt of all required information and fees. Various circumstances will affect the processing of incomplete applications. Although most are evaluated within one week of receipt of additional information, under certain conditions more time may be required.

If you have not received a response from MCLE regarding accreditation of your CLE activity within 10 days of filing, please contact our office so that we can confirm receipt and advise you of the status of your application.

GENERAL INSTRUCTIONS FOR COMPLETING THE APPLICATION FOR ACCREDITATION

- Complete all sections of the application fully. This speeds up data entry, evaluation and notification time. (Instructions for completing the application can also be found on the back of the application form).
- Providing a fax number (Part A) and email address will allow us to fax or email the notification to you immediately after review of your application.
- By submitting your application as early as possible, you will be taking advantage of free advertising for the seminar. A list of approved CLE activities is available at our online searchable course database. A link to this site can be found at www.texasbar.com/mcle.

SPONSOR NUMBERS (Part A of the Application)

If this is the first time you have applied for MCLE accreditation, your organization will not have a sponsor number. Please leave this area on the application blank. You will be assigned a sponsor number upon receipt of your application.

PROVIDING CLE ACTIVITY INFORMATION (Part B of the Application)

Presentation Dates/Locations

Repeat presentations can be listed on the same application, or can be added later by letter, fax, or telephone request. (Please see Repeat Presentations section below).

CLE Credit Hours

Calculation of CLE credit hours is based on the actual instruction time and expressed in terms of 60-minute hours, rounded to the nearest one-quarter hour. For example:

- 60 total minutes of instruction = $\boxed{1.00 \text{ hour}}$
- 72 total minutes of instruction = 1.20 hours = $\boxed{1.25 \text{ hours}}$ (rounded to nearest quarter hour)
- 100 total minutes of instruction = 1.66 hours = $\boxed{1.75 \text{ hours}}$ (rounded to nearest quarter hour)
- 95 total minutes of instruction = 1.58 hours = $\boxed{1.50 \text{ hours}}$ (rounded to nearest quarter hour)

Breaks and Meals

Time devoted to breaks, meals, meetings, keynote speeches and introductions are excluded from the calculation of credit hours. The following policies apply to all applications:

- If an application does not include break time, breaks will automatically be deducted from the program. (A fifteen-minute (0.25-hour) break will be deducted from each instructional period that lasts longer than 2.5 hours).
- One-half hour (0.50) will be deducted from topics presented during meals unless sufficient time has already been deducted for meal service and/or a change in meeting rooms.

Ethics Accreditation

If any portion of the activity is devoted to legal ethics or legal professional responsibility, then these parts or sessions must be clearly indicated and will need to meet the definition of legal ethics/professional responsibility outlined in the *Accreditation Standards for CLE Activities*.

Attachments

The required attachments for each application are specified in Part B. This documentation needs to be submitted with the application so your activity can be properly evaluated. If MCLE staff is unable to determine accreditation based upon the information received, or if we have specific questions about a topic or session, then

additional information may be requested to supplement your application. Requests for additional information may include more detailed topic descriptions, course materials, speaker information and/or information about the target audience for the activity.

ACCREDITATION FEE (Part C of the Application)

An accreditation fee is required for each CLE activity, unless exempt as set out in Section 10.8.5 of the MCLE Regulations. A series of CLE activities that occurs on non-consecutive dates shall be considered separate activities and will need to be submitted separately with an accreditation fee required for each application.

The accreditation fee per activity is either Option A (\$20 per credit hour) or Option B (\$10 per Texas attorney in attendance). Regardless of which option you choose, there is a minimum non-refundable fee of \$50 that must be submitted with each application. If you have selected Option A, the entire fee is due upon submission of the application. If you have selected Option B, \$50 is due upon submission of the application and the remaining fee, if any, is due within thirty (30) days after the conclusion of the CLE activity.

FILING DEADLINES

Applications should be filed at least 30 days prior to the starting date of the activity. MCLE will review applications received after the 30-day deadline, but if received less than 15 days prior to the starting date, an additional \$100 late filing fee will be required. Section 10.8.9 of the MCLE Regulations provides information on determining the late filing deadline.

Because payment is required to be received with the application, faxed applications are not accepted by MCLE unless a sponsoring organization is exempt from payment of the accreditation fee (MCLE Regulations, Section 10.8.5). Faxed applications are returned without processing.

APPLYING FOR A SERIES OF SESSIONS HELD ON NON-CONSECUTIVE DATES

MCLE accreditation policy requires that lengthy courses be applied for in segments. For example, if you are holding trial academy, which meets two days each week for three months, we may request that this activity be separated and assigned weekly or monthly course numbers. An effort will be made to keep application fees at a minimum, although it is possible that additional fees may be owed (MCLE Regulations, Section 10.8.1).

REPEAT PRESENTATIONS

A separate application is required for each activity unless the activity is being repeated in exactly the same format on different dates and/or in different locations. Repeat presentations will be added to an existing application for a twelve month period. (MCLE Regulations, Section 10.2.2)

For example: If the date of the first presentation is May 25, repeat presentation dates through April 30 of the following year can be added to the existing application.

You will need to call our office or submit a written request to MCLE to add repeat presentations to a previously made application. Your request should identify the original course number assigned by MCLE, the name and date of the activity, and the dates and locations of the scheduled repeat presentations. Faxed and emailed requests will also be accepted.

EXCLUSION: In-house CLE activities, repeated at different firms or organizations in which attendance is restricted to the attorneys and guests of each separate organization, shall be considered separate CLE activities and shall be submitted separately (MCLE Regulations, Section 10.2.3).

ADDITIONAL FORMS REQUEST

Complete Part E of the application ONLY if you require additional forms. The reverse side of the application identifies each form and its use. Accreditation Applications can be downloaded from the MCLE webpage: www.texasbar.com/mcle. If you are unable to print the form from the website, you may request several copies of the form to be mailed or faxed to you. Photocopies of the application will be accepted and original forms are not necessary.

EVALUATION OF YOUR APPLICATION

The MCLE staff will evaluate your application to determine if the activity submitted meets the accreditation criteria outlined in the *Accreditation Standards for CLE Activities*. In most cases, upon receipt of your application, evaluation and notification will occur within a 2-4 day time period. Our online site allows sponsors to review the status of any submitted application and if approved, you will be able to print your own accreditation notice at this site. Our staff will also send a notification to you upon approval or denial of MCLE accreditation. If your application is lacking an accreditation fee, late fee, or information necessary for evaluation, you will receive a "pending" notice requesting that the additional information and/or fees be submitted prior to final evaluation.

Under certain circumstances, your application may be forwarded to the MCLE Committee for further review. If you receive a notice that the MCLE Committee will be reviewing your application, you may want to contact the MCLE department for clarification and to arrange submission of any additional documentation that could be helpful to the MCLE staff or Committee in determining accreditation. The MCLE Committee meets quarterly, and sponsors are notified of the Committee's decision immediately following their meeting.

ATTENDANCE REPORTING REQUIREMENTS

CLE sponsors are required to timely submit Texas member attendance records to the MCLE Director for each accredited CLE activity. MCLE Regulations, Sections 6.1 - 6.3 outline the attendance reporting requirements and options for CLE sponsors. Currently, three options are available for reporting attendance:

1. Online Attendance Reporting – All CLE sponsors may access our online site to report attendance free of charge. You will need to keep a list of attorneys the name of each attorney, bar number and hours attended. Our online reporting site will allow a sponsor to submit attendance directly to MCLE. Contact MCLE via email at

mcle@texasbar.com to request a password and access to the Sponsor site. Include your name, organization name, sponsor number and address in your request.

2. State Bar of Texas CLE Course Attendance Form – Effective June 1, 2009, there is a \$2 per attendance form service charge due upon receipt of CLE Course Attendance Forms from the sponsor. CLE Course Attendance Forms are scan forms that can be completed by the attorney and then returned by the sponsor after each CLE Activity. Each attorney should complete ONE attendance form for the total number of CLE hours attended. If the course lasts two or more days, only one attendance form should be completed for the total number of hours completed during both days. It is important to make sure that attendees return the attendance forms to the sponsor representative immediately following the CLE activity. The MCLE department will not accept attendance forms submitted individually by attorneys.

Sponsors should keep and submit attendance forms completed for one activity separately from the attendance forms completed at other CLE activities. Otherwise, attorneys may end up receiving no credit, or credit for the wrong course.

The course sponsor is to return all of the completed attendance forms to the MCLE Department with the following information: Course Name, Course Date, Course Number, Sponsor Contact Name, Additional Fees Owed (if payment Option B was selected).

Sponsors may estimate the number of attendance forms that will be needed for a three to six month period. We will send you a supply of forms (within reason) so that you have these forms on hand for each of your scheduled CLE activities.

3. Electronic Attendance File – Sponsors may submit attendance via submission of a specially formatted text file. Please contact the MCLE department for information on text-file submission.

CLE sponsors are not responsible for meeting individual attorney reporting deadlines

Sponsors should report all attendance, but if an attorney is in danger of missing a reporting deadline, then that attorney should immediately report on his or her own via the State Bar of Texas MCLE Online reporting site found under the “my bar page” feature at www.texabar.com, or by completion and submission of a CLE Credit Input Form to be obtained from the MCLE Department.