HSBA
Hawaii State Bar Association

# CLE Program Provider Checklist

- ❖ Completed Provider Application for Approval of Continuing Legal Education

- ❖ Course description, outlines, time schedules, and/ or agendas to assist the MCLE Administrator and MCLE Board assess the type and amount of credits to be approved.

- ❖ Faculty description of program presenters.

- ❖ Any necessary fees (please refer to the Continuing Legal Education Fee Schedule).

**Payment methods:**

- ✓ Check (made out to HSBA) or
- ✓ Credit Card (HSBA Credit Card Authorization form may be used).

Send completed form, accompanying materials, and payment by mail, email, or fax to:


Debbie Blanton
MCLE Administrator
HSBA, Alakea Corporate Tower
1100 Alakea Street, Suite 1000
Honolulu, HI 96813
dblanton@hsba.org
808-792-7348
Fax: 808-521-7936

## Provider Application for Approval of Continuing Legal Education
## HAWAII STATE BAR ASSOCIATION

**(FOR HSBA USE)**

Course Number: _____ Date: _____

The following action has been taken on this application:

☐ **APPROVED** for a total of _____ VCLE credits **INCLUDING**

_____ MCPE Credits _____ Accredited Provider Status

☐ **NOT APPROVED** (See comments.)

☐ **RETURNED** for the request of additional information.

Please complete each item as indicated by the numbers circled below.

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16

☐ **OTHER** (Regulator comments.)

**1. PROVIDER INFORMATION:**

NAME

REPRESENTATIVE NAME

ADDRESS

CITY STATE ZIP

TELEPHONE FAX

EMAIL

**2. TITLE OF EDUCATIONAL ACTIVITY :**

**3. DATE(S):**

**4. LOCATION(S):**

**5. COURSE FEE TO BE CHARGED**:

**6. METHODS OF PRESENTATION:**

☐ Faculty in Room with Participants ☐ Telephone to Broadcast Site ☐ Live Web Cast ☐ Interactive Video

☐ Recorded Audio Presentation ☐ Recorded Video Presentation ☐ Internet On-Demand (Interactive) ☐ Discussion Leader present

☐ Satellite ☐ Other:

**7. TYPE OF LAW:**

1 3

2 4

**8. ADVERTISED TO:**

☐ Lawyers ☐ Clients ☐ Others:

**9. LIST ANY ADMISSION RESTRICTIONS**:

**10. IN-HOUSE ACTIVITY INFORMATION:**

Open/Publicized to Outside Lawyers ☐Yes ☐No

Outsiders are _____ % of Faculty / Clients are _____ % of audience

If not open, please specify reason: _____

**11. ACCREDITATION BY OTHER STATES:**

Granted:

Denied:

**12. METHOD OF EVALUATION**: ☐Participant Critique ☐Independent Evaluator ☐None ☐Other:

**13. MATERIALS DESCRIPTION:**

Estimated total pages: ____ ☐Loose leaf ☐Bound ☐No Materials Supplied

Distributed: ☐Before Program ☐At Program ☐Other:

**14. REQUIRED ATTACHMENTS TO THIS APPLICATION:**

a. Substantive Outline with Time Schedule/Agenda

b. Table of Contents

c. Faculty Description

**15. CREDITS REQUESTED:**

Indicate hours of instruction rounded down to the nearest 1/4 hour not including breaks, meals, or introductions:

VCLE: _____ MCPE: _____ Total: _____

☐ **ACCREDITED PROVIDER APPLICANTS**

Please submit brochures from the previous year of 3 courses that you feel would have met the requirements of Regulation 3 of Hawaii's Continuing Legal Education Regulations.

**16. FEE REMITTED: (See CLE Fee Schedule)**

$_____

By signing below I certify that I have read the Continuing Legal Education Regulations issued by the Hawaii State Board of Continuing Legal Education and certify that I, or the company I am authorized to represent, will comply with the provisions thereof.

Name _____ Title_____ Date_____

**Hawaii State Bar Association**
1100 Alakea Street, Suite 1000
Honolulu, HI 96813

**P**: 808-537-1868 **F**: 808-521-7936 **WEB**: www.hsba.org

# Excerpts from
# The Continuing Legal Education Regulations

Last updated August 14, 12

**REGULATION 3. Standards for Course or Activity Approval**

The Board may approve CLE courses or activities when consistent with these standards:

(A) General CLE Standards:

(1) The course or activity is an organized program of learning with significant intellectual or practical content and deals with matters directly related to the practice of law.

(2) The course or activity's primary purpose is to improve the participant's professional competence as an attorney. Areas of professional competence include substantive legal issues, legal skills or practice, improving the attorney's delivery of legal services to clients, and improving the efficiency of the practicing attorney.

(B) Professionalism Standards. To be approved for MCPE credits, the course or activity shall be devoted to matters involving an attorney's ethical obligations, professional responsibility, bias awareness and prevention, client trust account administration, access to justice, case management, malpractice prevention and law office management.

(C) The course being taught shall be primarily for attorneys on substantive legal subjects or subjects related to the practice of law.

(D) Each course or activity participant is provided with appropriate, legible, substantive course or activity material at or before the time the course or activity is offered, unless the absence of such materials is reasonable under the circumstances of the particular course. Materials may either be in hardcopy or electronic format, and syllabi or agenda outlining the course or activity must be followed.

(E) Courses or activities are approved for MCPE or VCLE credit if they are classified as CLE approved by:
(1) The HSBA;
(2) The American Bar Association (ABA); or
(3) The Board.

(F) The number of approved MCPE or approved VCLE credits that may be eared from ABA courses shall be the same number of credits the course is advertised as approved for by the ABA.

(G) Courses or activities for which credit will be denied include but are not limited to matters relating primarily to personal self improvement courses, activities designed primarily to sell services, equipment or software programs, courses that are designed to enhance revenue, marketing courses or repeat courses for which the active member has already obtained CLE credit.

(H) In order to receive CLE credit for an approved course, an attorney must be present for the first 60 minutes of a course. After the first 60 minutes, an attorney may receive credit for the time the attorney is actually present at the course rounded down to the nearest quarter hour. If an attorney is late to the start of a course, the attorney may enter the course but shall not receive CLE credit for the course.

**REGULATION 11. Provider Requirements**

Provider shall:

(A) Monitor participant attendance throughout the activity and keep an attendance record for the course or activity for a minimum of 2 years. The attendance record shall be provided to the Board upon request at no cost to the Board.

(B) Issue evaluation forms and certificates of attendance to participants at the conclusion of the course or activity; provided that government providers may issue certificates of attendance to participants upon request by a participant. The provider shall forward a copy of all course evaluations completed by active members of the Hawaii State Bar to the Board upon request at no cost to the Board.

(C) Permit any member of the Boar or its designee to attend a course or activity at no cost or without preregistration for the purpose of compliance auditing.

(D) Submit written, electronic or presentation materials to the Board upon its request free of charge.

(E) Submit an application and application fee pursuant to the attached fee schedule for each course for which approval is being sought.

(F) Within 30 days of completion date for each course or activity the provider shall send the attendance roster and corresponding attendee fee to the Board. If the roster and attendee fee are not timely received by the Board, a late fee shall be assessed in addition to the attendee fee.

# Continuing Legal Education Fee Schedule

## I. Providers

(A) Providers seeking approval for a for-fee course or activity for CLE credit . . . . . $100.00 per credit hour up to a maximum of $500.00 + $5.00 per attendee

(B) Providers seeking approval for a no-fee course or activity . . . . . $0.00

(C) Providers seeking Accredited status . . . . . $500.00 annually + $10.00 per attendee per course or activity

(D) Late fee for attendee fees not received by the due date . . . . . $250.00

(E) Late fee for applications received less than 30 days before a scheduled course or activity . . $ 50.00

## II. Attorneys

(A) Active members seeking credit approval for a course or activity that has not already been approved

. . . . . .$5.00 per credit hour

(B) Active members seeking approval for teaching credit who were not compensated for teaching . . . . . $ 0.00

(C) Late fee for applications received more than 30 days after the end of a course, seminar or conference . . . . . $ 50.00

(D) Late compliance with CLE requirements fee . . . . . $ 50.00

Amended February 13, 2012

Hawaii State Bar Association

**CREDIT CARD**
**AUTHORIZATION**
**(MCLE Fee)**

**Applicant's Name** (please print): _____

**Phone No.**: _____ **Email**: _____

**Billing Address**: _____

**Credit Card Type**:
- ☐ VISA
- ☐ MasterCard

**Credit Card No.**: _____ **Exp. Date**: _____/_____

**I hereby authorize the Hawaii State Bar Association to charge the above-referenced credit card in the amount of $** _____ (see CLE Fee Schedule posted online) **for the following MCLE Fee(s)** (check all that apply):

*Providers*
- ☐ Provider Application Fee
- ☐ Late Provider Application Fee
- ☐ Accredited Provider Annual Fee
- ☐ Attendee Fees for _____ Attendee(s)
- ☐ Late Attendee Fees
- ☐ Other _____

*Attorneys*
- ☐ Attorney Application Fee
- ☐ Late Attorney Application fee
- ☐ Late Compliance with CLE Requirement Fee

**Name on Credit Card** (please print): _____

_____
**Authorized Signature** **Date**

Please submit this form to Debbie Blanton, MCLE Administrator by mail at HSBA, Alakea Corporate Tower, 1100 Alakea Street, Suite 1000, Honolulu, HI 96813 or via email at dblanton@hsba.org or by fax at 808-521-7936.