

**CALIFORNIA BOARD OF LEGAL SPECIALIZATION  
OF THE STATE BAR OF CALIFORNIA**



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**Information Letter for  
Legal Specialist Education Compliance Group 3 (N-Z)**

**Reporting Deadline: February 1, 2017**

**Please file your Legal Specialist Education Compliance Card(s) using the attached form by February 1, 2017.**

Under rules adopted effective January 1, 2014, you, and all certified specialists in MCLE Compliance Group 3, will now report your legal specialist education compliance at the same time that you report your MCLE compliance, which will be by February 1, 2017 for this reporting cycle.

While you report MCLE Compliance online, in contrast, you will report Legal Specialist Education Compliance using the attached paper form.

There is no charge to file your Legal Specialist Education on the attached form and copies of the form are also available at [www.californiaspecialist.org](http://www.californiaspecialist.org) under the Resources / Forms tabs.

You are required to complete at least thirty-six (36) hours of legal specialist approved education or an equivalent and report this compliance on the attached paper form by your MCLE Compliance Group 3 deadline of February 1, 2017.

**The following information summarizes equivalents that may assist you in fulfilling your legal specialist education requirement.**

- 1. Include courses from 2013 (one additional year versus the standard 3-year reporting period).***

For this compliance period only, a special equivalent allows you to include courses taken in 2013 toward your total of 36 hours of legal specialist education. This one-time expansion of time is being made to recognize that some certified specialists took courses during 2013, planning to use them to fulfill the education requirement over the five-year reporting period in effect at the time that the courses were taken.

**2. Include MCLE-approved education in your specialty area.**

MCLE-approved education may be counted toward your legal specialist education requirement if the subject of the course is specifically the specialty area of law. Note that the California Board of Legal Specialization (CBLIS) retains the final discretion to determine whether a course qualifies as an equivalent. As in the past, please be sure to keep documentation for at least a year after the compliance reporting deadline to demonstrate that the course is substantively relevant to your certified specialty if asked to provide further information by the CBLIS. Consistent with the policy above, any of these courses taken in 2013 may be applied to the 36-hour total requirement.

**3. Claim up to 18 hours of credit for using self-study alternatives.**

As in previous years, time spent on scholarly writing in the specialty area can be used to satisfy up to 18 hours or half of your total requirement. In addition, for first-time presentations at an approved MCLE and/or legal specialist activity, you may claim four hours credit for every hour of actual presentation time.

**4. Note that subfield requirements for applicable specialties have been waived.**

For this reporting cycle only, the subfield requirement for certified specialists in Appellate Law, Estate Planning, Trust & Probate Law, Family Law, and Immigration & Nationality Law will be waived. All certified specialists are still encouraged to take a broad range of educational courses to maintain a broad base of expertise in the specialty.

Note that these subfields are different from the subfields required for your MCLE reporting; when you report your MCLE compliance on your My State Bar Profile, you will still need to comply with those subfield requirements for Legal Ethics, Competence Issues, and Recognition and Elimination of Bias.

**5. Certified Specialists who were initially certified after February 1, 2014 have a reduced and proportional requirement.**

For first-time certified specialists who were certified after February 1, 2014, the educational requirement is pro-rated. For example, a certified specialist who was certified for the first-time for half of the 36-month compliance period would need to report half of the 36-hour educational requirement, or 18 hours, of legal specialist education. Conveniently, since there are 36 months in a compliance period, and the educational reporting requirement for the period is 36 hours, the pro-rated total will be equal to one hour for each month that you have been a certified specialist. If you have been a certified specialist since February 1, 2014 or earlier, do not pro-rate your education, regardless of your recertification date.

**Frequently asked questions for special situations.**

***Dual specialists will need to submit two compliance forms.***

Certified specialists who hold more than one certificate of specialization must submit two compliance forms, one for each specialty area, by the same reporting deadline.

**Certified specialists will still recertify on a five-year schedule.**

All certified specialists will still need to recertify every five years, and your recertification date will not change. You will not report legal specialist educational compliance on the recertification forms. The Department of Legal Specialization will continue to send you reminders as your recertification date approaches.

**Please continue to report MCLE Compliance separately through your My State Bar Profile.**

Please note that you will also need to report your MCLE compliance by February 1, 2017 by logging on to your My State Bar Profile, if you have not already done so.

Thank you for your patience during this transition period and for reporting your compliance timely. It is hoped that this change will ultimately be more convenient for all certified specialists and will also increase visibility of the certified specialist program to all attorneys.

The Department of Legal Specialization is happy to answer any questions you may have. Please contact the Department via e-mail for fastest response at [legalspec@calbar.ca.gov](mailto:legalspec@calbar.ca.gov), or view a list of frequently asked questions online at [www.californiaspecialist.org](http://www.californiaspecialist.org).