

## **Provisional License Program Rubrics and Templates**

The Provisional License Program uses numerous rubrics for scoring Portfolios and their components, as well as templates to structure information provided by Provisional Licensees. To provide transparency, this packet includes all rubrics and templates used in the program. Provisional Licensees and Supervising Attorneys will find separate Word and Excel versions of their forms, which are better suited for daily use, elsewhere on the PLP website.

### Forms for Provisional Licensees

- Template for Learning Plan
- Instructions for Timesheet Template
- Template for Background and Reflection on Written Work Product
- Template for Reflection on Initial Client Interview
- Template for Reflection on Client Counseling Session
- Template for Reflection on Negotiation

Note that Provisional Licensees do not have to complete both client interviews and client counseling sessions; they need to complete only two client encounters, which may be of either type. The reflection templates are slightly different for the two types of client encounters.

The Admissions Department is still developing guidance for organizing and submitting portfolios. That information will be posted on the PLP website well before the end of the program's first quarter.

### For Supervising Attorneys

- Supervising Attorney Rubric for Contracts, Leases, and Other Documents with the Force of Law
- Supervising Attorney Rubric for Emails, Motions, Memos, Etc.
- Supervising Attorney Rubric for Initial Client Interview
- Supervising Attorney Rubric for Client Counseling Session
- Supervising Attorney Rubric for Negotiation

Note that, although Provisional Licensees use a single template for any type of written work, supervisors choose one of two rubrics to assess that work. The first rubric applies to contracts, leases, and other documents with the force of law. The second rubric applies to all other types of written work, including emails, motions, and memos.

### For Examiners

- Examiner Rubric for Contracts, Leases, and Other Documents with the Force of Law
- Examiner Rubric for Emails, Motions, Memos, Etc.
- Examiner Rubric for Initial Client Interview
- Examiner Rubric for Client Counseling Session
- Examiner Rubric for Negotiation
- Examiner Rubric for Learning Plan
- Examiner Rubric for Portfolio
- Quarterly Summary Sheet

Provisional Licensees and Supervising Attorneys will not complete the Examiner rubrics, although they will view those forms after Examiners have completed them.

**Oregon Provisional License Program  
Learning Plan Template**

**Licensee's Identifying Number:** \_\_\_\_\_

**Date Submitted:** \_\_\_\_\_

Provisional Licensees should use this template to plan work on all required components of the Licensing Program. Licensees must submit an updated version of this plan with each Quarterly Portfolio and the Final Portfolio.

**What were your primary accomplishments during the last quarter?**

**What did you learn during the last quarter that will improve your work during the next quarter?**

**What is your primary learning focus during the next quarter? If you are submitting this plan as part of your Final Portfolio, how do you plan to continue learning and growing as a professional?**

**Continued on Next Page**

Use the table below and on the following pages to plan completion of specific Program requirements.

<b>Required Component</b>	<b>Target Completion Date</b>	<b>Completion Date</b>
Learning the Ropes CLE Program		
<b>NLMP Components</b>		
• Get Acquainted Meeting		
• Attendance at Meetings of Bar Association or Other Law-Related Groups		
• Discussion of Customs, Etiquette, and Behavior in Community		
• Introduction to the Legal Community Optional Activity:		
• Discussion of Ethical Issues that Arise with Some Regularity		
• Discussion of OSB Statement on Professionalism		
• Discussion of Cultural Competence		
• Professionalism Optional Activity:		
• Discussion of Neglect and Failure to Communicate with Client		
• Discuss Malpractice Insurance Coverage and Disclosure Requirements		
• Law Office Management Optional Activity:		
• Discussion of Conflicts of Interest		
• Discussion of Maintaining Good Client Relations		
• Working with Clients Optional Activity:		
• Discussion of Challenging Relationships and Support Systems		
• Discussion of Warning Signs of Substance Abuse and Depression		
• Career Satisfaction Optional Activity:		
• Practice Activity One:		
• Practice Activity Two:		
• Practice Activity Three:		
• Practice Activity Four:		
• Practice Activity Five:		

Required Component	Target Completion Date	Completion Date
• Practice Activity Six:		
• Practice Activity Seven:		
• Practice Activity Eight:		
• Practice Activity Nine:		
• Practice Activity Ten:		
Independently Authored Written Work Product		
• Document One:		
• Reflection on Document One		
• Supervising Attorney's Assessment of Document One		
• Document Two:		
• Reflection on Document Two		
• Supervising Attorney's Assessment of Document Two		
• Document Three:		
• Reflection on Document Three		
• Supervising Attorney's Assessment of Document Three		
• Document Four:		
• Reflection on Document Four		
• Supervising Attorney's Assessment of Document Four		
• Document Five:		
• Reflection on Document Five		
• Supervising Attorney's Assessment of Document Five		
• Document Six:		
• Reflection on Document Six		
• Supervising Attorney's Assessment of Document Six		
• Document Seven:		
• Reflection on Document Seven		
• Supervising Attorney's Assessment of Document Seven		
• Document Eight:		

Required Component	Target Completion Date	Completion Date
• Reflection on Document Eight		
• Supervising Attorney's Assessment of Document Eight		
Client Interviews or Counseling Sessions		
• Interview/Session One		
• Reflection on Interview/Session One		
• Supervising Attorney's Assessment of Interview/Session One		
• Interview/Session Two		
• Reflection on Interview/Session Two		
• Supervising Attorney's Assessment of Interview/Session Two		
Negotiations		
• Negotiation One		
• Reflection on Negotiation One		
• Supervising Attorney's Assessment of Negotiation One		
• Negotiation Two		
• Reflection on Negotiation Two		
• Supervising Attorney's Assessment of Negotiation Two		
Learning Plans		
• Starting Plan		
• End of First Quarter Plan		
• End of Second Quarter Plan		
• End of Third Quarter Plan		
• End of Fourth Quarter Plan		
• End of Fifth Quarter Plan		
• Final Plan		
Timesheets		
• First Quarter Timesheets		
• Second Quarter Timesheets		
• Third Quarter Timesheets		
• Fourth Quarter Timesheets		
• Fifth Quarter Timesheets		
• Final Timesheets		
Optional Activities [List any CLE's or other learning activities you plan to pursue]		

<b>Required Component</b>	<b>Target Completion Date</b>	<b>Completion Date</b>

### Provisional License Program Timesheet Instructions

Provisional Licensees will use timesheets to document the 1500 hours of work required to complete the program. A timesheet template is available as a separate Excel document. Here are the instructions for using that timesheet:

- Remember to document all time devoted to the program, even if that time is not billable to a client. See Rule 6.12 for an explanation of time that may properly be counted.
- Record time in 6- or 15-minute intervals, using decimals (e.g., 30 minutes is .5 of an hour).
- Provide a general description of your work, but do not identify clients or matters.

Here is an example of appropriate timesheet entries:

<b>Date</b>	<b>Activity</b>	<b>Hours</b>
9/22/2022	Research for trial motion	2.5
	Accompany supervisor to hearing and observe	1.2
	Lunch meeting with mentor to get acquainted	1.0
	Write first draft of trial motion	1.3
	Meet with supervisor for new assignment (lease)	0.4
	Talk to paralegal about lease forms	0.5
	Review client needs for lease	0.6
	Choose appropriate lease form and modify for client	2.1
9/23/2022	Review supervisor's feedback on trial motion and edit	0.8
	Discuss lease with supervisor	0.2
	Revise lease	0.5
	Attend client meeting with supervisor	1.2
	Attend CLE	3.0
	Update learning plan	0.2
<b>Total Time Recorded on This Sheet</b>		<b>15.0</b>



**Provisional Licensee’s Background and Reflection  
on Written Work Product**

**Licensee’s Identifying Number:** \_\_\_\_\_

**Work Product Number:** \_\_\_\_\_

1. What is the purpose of this work product? How does it fit within your overall strategy for the matter?

2. In this table, list in the lefthand column at least three (five for documents exceeding 1500 words) legal rules, principles, or practices that you needed to know to complete this work product. These may include rules of substantive law, rules of procedure, local practices, or practices of your Employer.

Then note in the righthand column how you acquired knowledge of each rule, principle, or practice. E.g., “recalled the rule from law school,” “consulted my Supervisor,” “consulted another lawyer,” “checked court rules,” “used the internet,” etc. Be as specific as possible: specificity will improve your learning process and will help examiners understand the context of your work.

Rules, Principles, or Practices	How Acquired

**Continued on Reverse**

3. How did you acquire the factual information you needed to complete this work product?

4. Did you rely on a sample or template to create this work product?

Yes \_\_\_\_\_ No \_\_\_\_\_

If yes, please (a) attach that sample or template; (b) highlight the words in your work product that represent edits or additions; and (c) answer the remaining two questions.

5. Why did you choose that sample or template?

6. What challenges did you face in adapting the sample or template to your project?

**Provisional Licensee's Reflection on  
Initial Client Interview**

**Licensee's Identifying Number:** \_\_\_\_\_

**Client Encounter Number:** \_\_\_\_\_

**1. Which aspects of the interview went well?**

**2. Which aspects of the interview were most challenging? Why?**

**3. What have you learned from those challenges that you can apply to future client interviews? Be as specific as possible about concrete steps you will take.**

**Continued on Reverse**

**4. How did you prepare for this interview?**

**5. Will you prepare differently for future interviews? If so, how?**

**Provisional Licensee's Reflection on  
Client Counseling Session**

**Licensee's Identifying Number:** \_\_\_\_\_

**Client Encounter Number:** \_\_\_\_\_

**1. What were your goals for this counseling session?**

**2. To what extent did you achieve those goals?**

**3. Which aspects of the session went well?**

**4. Which aspects of the session were most challenging? Why?**

**Continued on Reverse**

**5. What have you learned from those challenges that you can apply to future client counseling sessions? Be as specific as possible about concrete steps you will take.**

**6. How did you prepare for this counseling session?**

**7. Will you prepare differently for future counseling sessions? If so, how?**



**6. Was your preparation for the negotiation adequate?**

**7. Will you prepare differently for future negotiations? If so, how?**

**8. Did your opponent's statements, demands, or style surprise you? If so, how?**

**9. Were you able to respond effectively to those surprises? If not, what have you learned that will help you respond effectively in the future?**



**Supervising Attorney Rubric for Contracts, Leases, and Other Documents with the Force of Law**

	<b>Needs Improvement</b>	<b>Satisfactory</b>	<b>Proficient</b>	<b>NA</b>
<b>Issue Identification</b>	The document fails to address a critical issue or omits 2 or more other issues	The document addresses all critical issues but misses one lesser issue	The document addresses all issues appropriate for the client	
<b>Knowledge</b>	The document reflects insufficient knowledge of the legal principles affecting the client	The document reflects knowledge of most legal principles relevant to the client, but suggests need for improved knowledge on 1-2 principles	The document reflects knowledge of all legal principles relevant to the client	
<b>Use of Model or Template (if appropriate)</b>	The document fails to draw from an appropriate model or template	The document rests on an appropriate model or template, but a somewhat better model/template could have been chosen	The document rests on a well chosen model or template	
<b>Customization</b>	The document fails to reflect the client's distinctive concerns in several respects	The document appropriately reflects the client's distinctive concerns, but there is room for improvement on 1-2 points	The document fully reflects the client's distinctive concerns	
<b>Organization</b>	The document is poorly organized, making it difficult to find provisions	The document is well organized, although organization could improve in 1-2 places	The document is very well organized, making it easy to find provisions	
<b>Word Choice and Definitions</b>	The document uses a number of words that are inappropriate for the context and/or fails to define more than 2 key terms	The document generally uses appropriate words for the context and defines most key terms, but there is room for improvement in some places	The document uses appropriate words for the context and defines all key terms	
<b>Format, Grammar, and Spelling</b>	The document is poorly formatted and/or contains many spelling or grammatical errors	The document is well formatted and is mostly free of spelling and grammatical errors	The document is properly formatted and has very few spelling or grammatical errors	

**Continued on Reverse**

**Was this document used in a client matter?**

\_\_\_\_ **Yes**                      \_\_\_\_ **No**

**If yes, to what extent was this draft revised before use?**

\_\_\_\_ The draft needed only minor revisions before use

\_\_\_\_ The draft needed modest revision before use

\_\_\_\_ The draft needed substantial revision before use

\_\_\_\_ The draft was completely rewritten before use

**Comments from Supervising Attorney:**

**Licensee's Identifying Number:** \_\_\_\_\_

**Date:** \_\_\_\_\_

## Supervising Attorney Rubric for Emails, Memos, Motions, Etc.

	<b>Needs Improvement</b>	<b>Satisfactory</b>	<b>Proficient</b>	<b>NA</b>
<b>Identifying Issues</b>	The document fails to identify a critical issue—or omits 2 or more less critical issues	The document identifies all critical issues but misses a lesser issue	The document identifies all appropriate issues	
<b>Stating Legal Principles</b>	The document misstates one or more legal principles	The document accurately states all legal principles, although there is room for minor improvement on detail	The document accurately states all legal principles	
<b>Applying Legal Principles to Facts</b>	The document fails to apply more than 2 principles adequately to specific facts	The document applies most legal principles to specific facts, but application of 1-2 principles could be improved	The document adequately applies all legal principles to specific facts	
<b>Focus</b>	Includes many irrelevant issues, legal principles, and/or facts	Includes some irrelevant issues, legal principles, and/or facts	Focuses tightly on key issues, legal principles, and facts	
<b>Citing Sources of Law (if appropriate)</b>	The document fails to cite sources of law or cites inappropriate sources	The document cites appropriate sources in most places, but could improve in 1-2 respects	The document cites appropriate sources in all places, giving them appropriate weight	
<b>Organization</b>	The document is poorly organized, making it difficult for the reader to follow	The document is well organized, although organization could improve in 1-2 places	The document is very well organized, making it easy for the reader to follow	
<b>Audience</b>	The document is poorly addressed to the audience	The document properly addresses the audience, but falls short in 1-2 minor ways	The document is fully appropriate for the audience	
<b>Format, Grammar &amp; Spelling</b>	The document is poorly formatted and/or contains many spelling or grammatical errors	The document is well formatted and is mostly free of spelling and grammatical errors	The document is properly formatted and has very few spelling or grammatical errors	
<b>Summary or Recommendation</b>	There is no summary or recommendation, it is unclear, or it lacks important caveats	There is a summary or recommendation, but it lacks some clarity or caveats	The document offers a clear summary or recommendation, with appropriate caveats	

Continued on Reverse

**Was this document used in a client matter?**

**Yes**                       **No**

**If yes, to what extent was this draft revised before use?**

The draft needed only minor revisions before use

The draft needed modest revision before use

The draft needed substantial revision before use

The draft was completely rewritten before use

**Comments from Supervising Attorney:**

**Licensee's Identifying Number:** \_\_\_\_\_

**Date:** \_\_\_\_\_

## Supervising Attorney Rubric for Initial Client Interview

Competency	Needs Improvement	Satisfactory	Proficient	NA
<b>Professionalism</b>	Does not disclose status as provisional licensee	Discloses status but does not invite questions	Discloses status and invites questions/ concerns from client	
	Does not mention attorney client privilege	Mentions attorney client privilege but does not discuss nuances	Explains attorney client privilege fully, including when disclosure is required	
	Does not explain fees	Describes fees but does not invite questions	Describes fees in detail and invites questions	
	Provides no contact information	Provides information, but does not invite contact	Provides information and invites contact	
	Does not mention follow up	Mentions follow up but does not give specifics	Promises specific follow up within specified time	
<b>Client Interaction and Communication</b>	Uses highly structured questions rather than allowing client to tell story	Allows client to tell story but sometimes interrupts when unnecessary	Lets client tell full story with only essential interruptions	
	Frequently uses jargon without explanation	Sometimes uses jargon but clarifies in response to client questions	Uses jargon only when essential and explains without prompting	
	Does not ask about client's goals and interests	Asks about client's goals and interests, but does not follow up	Fully explores client's goals and interests	
	Does not invite any questions from client	Sometime invites questions from client	Repeatedly invites questions from client	
	Does not respond to most of client's questions	Responds to some, but not all, of client's questions	Responds to all of client's questions	
<b>Knowledge of Legal Processes</b>	Does not describe next steps or describes them inaccurately	Mentions next steps, but does not fully explain them	Fully and accurately describes next steps	
<b>Knowledge and Issue Identification</b>	Misses major legal issues raised by the interview	Identifies most, but not all, legal issues raised by the interview	Identifies all legal issues raised by the interview	
	States several points of law incorrectly	States one point of law incorrectly	States all points of law correctly	
	Claims full knowledge when research is necessary	Skirts over need for research rather than acknowledging need directly	Acknowledges need to check or research unfamiliar points	
<b>Research of Facts</b>	Asks few questions to elicit facts	Asks some questions to elicit key facts, but omits some areas of inquiry	Asks questions to elicit key facts related to legal issues	

Continued on Reverse

**Comments:**

**Licensee's Identifying Number:** \_\_\_\_\_

**Date:** \_\_\_\_\_

## Supervising Attorney Rubric for Client Counseling Session

Competency	Needs Improvement	Satisfactory	Proficient	NA
<b>Professionalism</b>	Tells client what to do	Tells client that decisions are up to them, but does not actively help client match interests to a plan	Helps client match their interests to a plan of action	
	Does not respond to (or agrees with) illegal actions client proposes	Counsels client against any illegal actions proposed by client		
	Does not summarize next steps	Summarizes next steps, but omits 1 or more details	Concludes meeting with a full summary of next steps	
<b>Client Interaction and Communication</b>	Omits 2 or more plausible options for client to consider	Presents several options to client but omits a plausible option	Presents all plausible options to client	
	Does not explain options adequately to client	Explains options to client but omits detail client might find helpful	Fully explains options to client	
	Does not refer to client's goals and interests	Asks about client's goals and interests, but does not follow up	Discusses client's goals and interests, including any changes	
	Frequently uses jargon without explanation	Occasionally uses jargon but clarifies in response to client questions	Uses jargon only when essential and explains	
	Does not invite any questions from client	Sometimes invites questions from client	Repeatedly invites questions from client	
	Does not respond to most of client's questions	Responds to some, but not all, of client's questions	Responds to all of client's questions	
<b>Knowledge and Issue Recognition</b>	Does not recognize new legal issues raised by the session	Recognizes some new legal issues raised by the session, but misses one	Recognizes any new legal issues raised by the session	
	States several points of law incorrectly	States one point of law incorrectly	States all points of law correctly	
<b>Research of Facts</b>	Asks few questions to elicit necessary new facts	Asks some questions to elicit necessary new facts, but omits some areas of inquiry	Asks questions to elicit all necessary new facts	

Continued on Reverse

**Comments:**

**Licensee's Identifying Number:** \_\_\_\_\_

**Date:** \_\_\_\_\_



### Supervising Attorney Rubric for Negotiation

**Note:** This rubric includes pre-negotiation preparation, as well as the negotiation. The Supervising Attorney should discuss the Provisional Licensee's plans orally before the negotiation or review a written plan. "PL" means Provisional Licensee. "SA" means Supervising Attorney.

Competency	Needs Improvement	Satisfactory	Proficient	NA
<b>Pre-Negotiation Planning</b>	PL misses more than 2 client interests (as known to SA)	PL identifies most client interests (as known to SA) but misses 1-2	PL identifies all client's interests (as known to SA)	
	PL misses more than 2 of opponent's interests (as known to SA)	PL identifies most of opponent's interests (as known to SA) but misses 1-2	PL identifies all of opponent's interests (as known to SA)	
	PL misstates (or does not know) outcomes authorized by client	PL correctly identifies range of outcomes authorized by client		
	PL misstates (or does not know) BATNA	PL correctly identifies BATNA		
	PL is wrong (or uncertain about) more than 2 legal rules underlying the dispute	PL understands most legal rules underlying the dispute, but is wrong (or uncertain) about 1-2	PL understands all legal rules underlying the dispute	
<b>Professionalism During Negotiation</b>	PL misrepresents materially relevant facts	PL accurately states materially relevant facts		
	PL exceeds client authority	PL remains within the bounds of client authority		
	PL misstates more than 1 point of law	PL accurately states most points of law, but misstates 1	PL accurately states all points of law	
<b>Communication During Negotiation</b>	PL does not articulate any positions	PL articulates positions, but could be more clear on details	PL articulates positions clearly	
	PL does not mention or acknowledge parties' interests	PL mentions parties' interests, but could use them more effectively	PL uses parties' interests to seek resolution	
	PL is unable to adapt to unforeseen positions and interests	PL shows some flexibility, but could adapt more readily to unforeseen positions and interests	PL adapts to respond to unforeseen positions and interests	
	PL fails to articulate (or prompt from opponent) any summary—or misstates more than 2 details	PL articulates (or assents to) points resolved, open issues, and next steps—but omits 1-2 details	At end of discussion, PL articulates points resolved, open issues remaining, and next steps—or assents to opponent's articulation	

Continued on Reverse

**Comments:**

**Licensee's Identifying Number:** \_\_\_\_\_

**Date:** \_\_\_\_\_

**Examiner Rubric for Contracts, Leases, and Other Documents with the Force of Law**

	<b>Working Towards Minimum Competence</b>	<b>Has Achieved Minimum Competence</b>	<b>Exceeds Minimum Competence</b>	<b>NA</b>
<b>Issue Identification</b>	The document fails to address a critical issue or omits 2 or more other issues	The document addresses all critical issues but misses one lesser issue	The document addresses all issues appropriate for the client	
<b>Knowledge</b>	The document reflects insufficient knowledge of the legal principles affecting the client	The document reflects knowledge of most legal principles relevant to the client, but suggests need for improved knowledge on 1-2 principles	The document reflects knowledge of all legal principles relevant to the client	
<b>Use of Model or Template (if appropriate)</b>	The document fails to draw from an appropriate model or template	The document rests on an appropriate model or template, but a somewhat better model/template could have been chosen	The document rests on a well chosen model or template	
<b>Customization</b>	The document fails to reflect the client's distinctive concerns in several respects	The document appropriately reflects the client's distinctive concerns, but there is room for improvement on 1-2 points	The document fully reflects the client's distinctive concerns	
<b>Organization</b>	The document is poorly organized, making it difficult to find provisions	The document is well organized, although organization could improve in 1-2 places	The document is very well organized, making it easy to find provisions	
<b>Word Choice and Definitions</b>	The document uses a number of words that are inappropriate for the context and/or fails to define more than 2 key terms	The document generally uses appropriate words for the context and defines most key terms, but there is room for improvement in some places	The document uses appropriate words for the context and defines all key terms	
<b>Format, Grammar, and Spelling</b>	The document is poorly formatted and/or contains many spelling or grammatical errors	The document is well formatted and is mostly free of spelling and grammatical errors	The document is properly formatted and has very few spelling or grammatical errors	

**Continued on Reverse**

**Comments by Examiner:**

**Is this document qualified?** A document is “qualified” if, after excluding any elements marked “NA,” the remaining elements are all marked “achieved” or “exceeds” minimum competence.

**Yes:** \_\_\_\_\_

**No:** \_\_\_\_\_

**Licensee’s Identifying Number:** \_\_\_\_\_

**Date:** \_\_\_\_\_

**Examiner Rubric for Emails, Memos, Motions, Etc.**

	<b>Working Towards Minimum Competence</b>	<b>Achieves Minimum Competence</b>	<b>Exceeds Minimum Competence</b>	<b>NA</b>
<b>Identifying Issues</b>	The document fails to identify a critical issue—or omits 2 or more less critical issues	The document identifies all critical issues but misses a lesser issue	The document identifies all appropriate issues	
<b>Stating Legal Principles</b>	The document misstates one or more legal principles	The document accurately states all legal principles, although there is room for minor improvement on detail	The document accurately states all legal principles	
<b>Applying Legal Principles to Facts</b>	The document fails to apply more than 2 principles adequately to specific facts	The document applies most legal principles to specific facts, but application of 1-2 principles could be improved	The document adequately applies all legal principles to specific facts	
<b>Focus</b>	Includes many irrelevant issues, legal principles, and/or facts	Includes some irrelevant issues, legal principles, and/or facts	Focuses tightly on key issues, legal principles, and facts	
<b>Citing Sources of Law (if appropriate)</b>	The document fails to cite sources of law or cites inappropriate sources	The document cites appropriate sources in most places, but could improve in 1-2 respects	The document cites appropriate sources in all places, giving them appropriate weight	
<b>Organization</b>	The document is poorly organized, making it difficult for the reader to follow	The document is well organized, although organization could improve in 1-2 places	The document is very well organized, making it easy for the reader to follow	
<b>Audience</b>	The document is poorly addressed to the audience	The document properly addresses the audience, but falls short in 1-2 minor ways	The document is fully appropriate for the audience	
<b>Format, Grammar &amp; Spelling</b>	The document is poorly formatted and/or contains many spelling or grammatical errors	The document is well formatted and is mostly free of spelling and grammatical errors	The document is properly formatted and has very few spelling or grammatical errors	
<b>Conclusion (at Beginning or End)</b>	There is no conclusion, it is unclear, or it lacks important caveats	There is a conclusion, but it lacks some clarity or caveats	The document offers a clear conclusion, with appropriate caveats	

Continued on Reverse

**Comments by Examiner:**

**Is this document qualified?** A document is “qualified” if, after excluding any elements marked “NA,” the remaining elements are all marked “achieved” or “exceeds” minimum competence.

**Yes:** \_\_\_\_\_

**No:** \_\_\_\_\_

**Licensee’s Identifying Number:** \_\_\_\_\_

**Date:** \_\_\_\_\_

**Examiner Rubric for Initial Client Interview**

**Based on your review of the Supervising Attorney’s rubric and the Provisional Licensee’s reflection, would you allow the Provisional Licensee to conduct an unsupervised initial client interview in their practice area?**

Yes \_\_\_\_\_ No \_\_\_\_\_

Checking “yes” means that this exercise is “qualified.” Checking “no” means that it is “not qualified.”

**If you checked “no,” how does the Provisional Licensee need to improve to achieve a “qualified” rating?**

**Other comments:**

**Licensee’s Identifying Number:** \_\_\_\_\_

**Date:** \_\_\_\_\_

**Examiner Rubric for Client Counseling Session**

**Based on your review of the Supervising Attorney’s rubric and the Provisional Licensee’s reflection, would you allow the Provisional Licensee to conduct an unsupervised client counseling session in their practice area?**

Yes \_\_\_\_\_ No \_\_\_\_\_

Checking “yes” means that this exercise is “qualified.” Checking “no” means that it is “not qualified.”

**If you checked “no,” how does the Provisional Licensee need to improve to achieve a “qualified” rating?**

**Other comments:**

**Licensee’s Identifying Number:** \_\_\_\_\_

**Date:** \_\_\_\_\_



**Examiner Rubric for Negotiation**

**Based on your review of the Supervising Attorney’s rubric and the Provisional Licensee’s reflection, would you allow the Provisional Licensee to conduct an unsupervised negotiation in their practice area?**

Yes \_\_\_\_\_ No \_\_\_\_\_

Checking “yes” means that this exercise is “qualified.” Checking “no” means that it is “not qualified.”

**If you checked “no,” how does the Provisional Licensee need to improve to achieve a “qualified” rating?**

**Other comments:**

**Licensee’s Identifying Number:** \_\_\_\_\_

**Date:** \_\_\_\_\_

### Examiner Rubric for Learning Plan

Criterion	Yes	No
Does the Learning Plan summarize accomplishments during the last quarter?		
Has the Provisional Licensee noted completion dates for those tasks?		
Does the Learning Plan identify lessons learned during the last quarter?		
Does the Learning Plan identify areas of focus for the next quarter?		
Has the Provisional Licensee noted target completion dates for those areas of focus?		

**Is this Learning Plan qualified?** The document is “qualified” if you checked “yes” for each of the four criteria above.

**Yes:** \_\_\_\_\_

**No:** \_\_\_\_\_

**Licensee’s Identifying Number:** \_\_\_\_\_

**Date:** \_\_\_\_\_

**Comments on the Learning Plan:**

### Examiner Rubric for Portfolios

**Does the Portfolio include each of these required elements?**

	Yes	No
Status on completing "Learning the Ropes" program		
Updated worksheets for New Lawyer Mentoring Program		
Learning Plan		
Timesheets		

**If the Portfolio includes any new written documents, are those documents accompanied by these elements?**

	Yes	No	NA
Reflection by Provisional Licensee			
Completed rubric from Supervising Attorney			

**If the Portfolio includes any new written documents based on a sample or template, are these elements present?**

	Yes	No	NA
Copy of sample or template			
Highlighting of Provisional Licensee's edits or additions			

**If the Portfolio includes any new materials about client interviews, client counseling sessions, and/or negotiations, are these elements present for each lawyering task?**

	Yes	No	NA
Reflection by Provisional Licensee			
Completed rubric from Supervising Attorney			

**Was the Portfolio submitted on time?**

Yes          No

**Is this Portfolio qualified?** The document is "qualified" if you checked "yes" or "NA" for each of the questions above.

Yes: \_\_\_\_\_

No: \_\_\_\_\_

Licensee's Identifying Number: \_\_\_\_\_

Date: \_\_\_\_\_

**Comments:**

**Provisional License Program  
Quarterly Summary Sheet**

This sheet summarizes the Provisional Licensee's progress towards completion of the Provisional License Program. Provisional Licensees who believe that an entry is erroneous should contact the Admissions Department as soon as possible.

**Licensee's Identifying Number:** \_\_\_\_\_

**Quarter:** \_\_\_\_\_ **End Date of Quarter:** \_\_\_\_\_

**Total Hours Completed by Quarter End Date:** \_\_\_\_\_

**Program Components Marked as Qualified Through This Quarter:**

<b>Component</b>	<b>Check When Qualified</b>
Learning the Ropes	
New Lawyer Mentoring Program	
Written Work Product 1 and Background/Reflection	
Written Work Product 2 and Background/Reflection	
Written Work Product 3 and Background/Reflection	
Written Work Product 4 and Background/Reflection	
Written Work Product 5 and Background/Reflection	
Written Work Product 6 and Background/Reflection	
Written Work Product 7 (at least 1500 words) and Background/Reflection	
Written Work Product 8 (at least 1500 words) and Background/Reflection	
Client Interview or Counseling Session 1 and Reflection	
Client Interview or Counseling Session 2 and Reflection	
Negotiation 1 and Reflection	
Negotiation 2 and Reflection	
Learning Plan 1	
Learning Plan 2	
Learning Plan 3	
Timesheet 1	
Timesheet 2	
Timesheet 3	
Portfolio 1	
Portfolio 2	
Portfolio 3	

**Comments:**