



Instructions and FAQs on Becoming Credentialed by Collaborative Divorce Texas

(Updated April 13, 2022)

It is the goal of Collaborative Divorce Texas for every one of our members to become credentialed.

Although the requirements and application process are demanding, they are objective. If you meet the requirements, you will be credentialed. The Credentialing Committee asks that you be diligent in completing your application. Read the Requirements, Application and FAQs/Instructions carefully before submitting your application. Due to the painstaking review of each application, the Credentialing Committee asks that you do not apply until you meet the criteria and your application is complete.

Please review carefully as these are your Instructions for completing the application for credentialing by Collaborative Divorce Texas.

1. What is the review process for credentialing?

When an application for credentialing is received, it is run through an initial screening to verify if the applicant has followed the instructions and has submitted all required materials. During the initial screening process, the Credentialing Committee will verify that the applicant meets the requirements for CDT membership, case completion and training/education. Applications that pass the initial screening will proceed to peer review. For Master Credentialed Collaborative Professional applications, the leadership and service requirement will also be reviewed once the application has passed the initial screening phase. All applicants will be notified by letter by the end of January following the application deadline, letting the applicant know if his or her application has been approved for credentialing or not. It is possible that applicants for Master Credentialed Collaborative Professional may not qualify at the Master Credentialed level, but will qualify for Credentialed Collaborative Professional that year. In such instance, the applicant will be credentialed at the Credentialed level even if the application is for Master Credentialed.

2. When does my membership year begin?

Your membership year begins on your membership date. Your membership date is the date your account was created. You can find the date your account was created in your profile on the Collaborative Divorce Texas website. If you do not have consecutive membership years, the date of your most recent membership applies. For example, if you initially joined on May 1, 2007 and you let your membership lapse in 2009, but then you joined again on November 30, 2011 and you have maintained consecutive membership since that date, then your membership date, for Credentialing application purposes, is November 30, 2011.

3. What constitutes a qualifying Collaborative Law Participation Agreement?

Perhaps the most burdensome aspect of application for credentialing is submission of redacted signed Collaborative Law Participation Agreements to meet the case experience requirement. The only way to qualify a case as collaborative is to review and verify that the case was conducted pursuant to a signed Collaborative Law Participation Agreement, which includes language that the collaborative lawyer is disqualified from appearing before a tribunal to represent a party in a proceeding related to the collaborative family law matter.

4. I am a mental health professional or financial professional, may I submit my Neutral Participation Agreement for the requirement of a signed copy of the Participation Agreement?

No. The Participation Agreement must be the Collaborative Law Participation Agreement signed by the lawyers and clients (“Lawyer Participation Agreement”). If in your geographic area, the neutrals also sign this Lawyer Agreement, meaning there is only one Participation Agreement for the entire professional team, then that agreement should be submitted. If you are in a geographic area in which Neutral Professional Agreements are signed in addition to the Participation Agreement signed by the lawyers and the clients, you will need to obtain from the lawyers on the case their Lawyer Participation Agreement. Neutral Participation Agreements alone are not accepted.

5. How do I submit the Lawyer Participation Agreement as part of my application?

For each Lawyer Participation Agreement submitted, **redact** the client names from the signed Participation Agreement, and write the case number corresponding to your Exhibit A Collaborative Case Information sheet. On Exhibit A, you will identify each qualifying case as Case ___ of ___ required for application. That number should be written on the corresponding signed Lawyer Participation Agreement. For example, “Case 1” should be written on the attached signed Lawyer Participation Agreement that refers to Case 1 on Exhibit A.

6. What if I cannot locate a Lawyer Participation Agreement for a collaborative case I have completed?

- a. **Due Diligence:** You need to exercise due diligence in locating the signed Lawyer Participation Agreement for a qualifying case. Meaning, you must procure the Lawyer Participation Agreement even if it is not located in your personal files or is not in your possession. In order for a case to qualify for credentialing, you must show the Credentialing Committee that a Lawyer Participation Agreement was signed. Some options for locating the Lawyer Participation Agreement include contacting each team member on the case to track down the signed copy, working as a group to identify and provide the signed copy to each other, or contacting the court if you routinely filed the Lawyer PA with the Notice of Collaborative Law Procedures (these filings are found in the district court public records, usually online).

- b. Verification in Lieu of Participation Agreement: The Committee will only qualify a case without a signed Lawyer Participation Agreement if, after completing due diligence, you swear that all signed copies of the Lawyer PA are unavailable due to:
- i. Change in employment prohibiting access to the files;
 - ii. Retirement of team member(s);
 - iii. Death of team member(s);
 - iv. Destruction pursuant to written document destruction policy; and/or
 - v. Destruction by natural disaster

If a case meets the above criteria, then you may submit a Verification in Lieu of Participation Agreement instead of the signed Lawyer Participation Agreement. The Verification in Lieu of Participation of Agreement Form may be found on the CDT website under the Credentialing Tab. You must complete and sign a Verification for any case you submit without a signed Lawyer Participation Agreement. The inclusion of a completed Verification does not automatically guarantee that such case will be counted toward the required number of cases.

7. Where can I find the cause number on a case?

The cause number will be on the Notice of Collaborative Law Procedures, any Petition or pleading filed in the matter, and on any Decree or Order entered in the case. The only exceptions are premarital or post-marital agreements, which typically do not include court filings. In those cases, there probably isn't a cause number.

8. Do cases that opted out count as a qualifying case?

Yes. As long as you have a signed Lawyer Participation Agreement, how the case concluded – whether by agreed order or by termination of the process – does not matter. Professionals that did not participate in the entire case must have participated in at least 50% of the team meetings for the case to be counted.

9. What is considered to be the date a case concluded?

Only concluded cases may be submitted for the case experience requirement. A case is considered concluded once the agreed order is entered, the pre-marital or post-marital agreement is signed, or if the collaborative process terminated. If the case concluded by agreement, then either the date the agreed order was entered with the court or the date the pre-marital or post-marital agreement was signed would be the conclusion date. If the case concluded by termination of the collaborative process, then the date of the Notice of Termination of Collaborative Process or Non-suit was filed is the date concluded. The date of conclusion must be included on Exhibit A for each submitted case for the Credentialing Committee to determine if you have the requisite number of concluded cases to meet the case experience requirement.

10. In completing the Training and Education section of the application, may I attach my CLE History Report (or other reporting document from my licensing agency) for the Credentialing Committee to review and determine which courses I attended count toward the specific credentialing education and training requirement, and if I have the requisite number of hours?

No. You must fill in the application on your own, including completing the chart that is included in the application for your 25 additional hours of collaborative education and training. Do not simply attach a CLE History Report or other report from your licensing agency in lieu of completing the application and chart in full. The Credentialing Committee will not review such reports and decide for you how to allocate your education/training history to the specific credentialing requirements.

11. What counts as Basic Collaborative Interdisciplinary Training or “other basic collaborative training”?

The Credentialing Committee takes a broad view on what qualifies as Basic Collaborative Interdisciplinary Training, since many applicants attended their first collaborative training many years ago before there was any standardization in Texas of entry-level collaborative training. The Credentialing Committee, therefore, will accept any entry-level collaborative training offered by any organization or individual, not just the Basic Collaborative Interdisciplinary Training offered by Collaborative Divorce Texas (formerly CLI-TX). As examples, the basic collaborative trainings offered by Chip Rose and Pauline Tesler would count as basic collaborative training, even though they are not interdisciplinary.

12. When does the 5 year period begin for the Training, Experience, and Education requirements?

Since the application deadline is Sept 30, you may list any cases completed and or training received beginning January 1st of the year that is five years prior to the application year. For example if you are applying in September 2017, the qualifying period is January 2012 through September 2017.

13. What counts as Collaborative Divorce Texas (formerly Collaborative Law Institute of Texas) Advanced Training?

You must have attended one CDT/CLI-TX Advanced Training in the last 5 years prior to your application date. Only those Advanced Trainings sponsored by Collaborative Divorce Texas (formerly Collaborative Law Institute of Texas) count toward this requirement. Any other training or education labeled “Advanced” will count toward the requirement of 25 additional hours of collaborative education or training, but not toward the CDT/CLI-TX Advanced Training requirement. The Collaborative Track offered at State Bar of Texas Advanced Family Law Course (held in August each year) does not count toward the CDT/CLI-TX Advanced Training requirement, but again will count toward the requirement of 25 additional hours of collaborative education or training.

The following are the qualifying CDT/CLI-TX Advanced Trainings:

- **June 23, 2017** CDT Advanced Interdisciplinary Training, Dallas
- **June 15, 2018** CDT Advanced Interdisciplinary Training, Austin
- **June 21, 2019** CDT Advanced Interdisciplinary Training, Dallas
- **June 12, 2020** CDT Advanced Interdisciplinary Training, Dallas
- **June 24-25, 2021** CDT Advanced Interdisciplinary Training, Zoom
- **Sept 23-24, 2021** CDT Advanced Interdisciplinary Training, Zoom
- **June 24, 2022** CDT Advanced Interdisciplinary Training, Austin

Any CLI-TX Advanced Interdisciplinary Training prior to the training on June 24, 2016 will not count toward the Advanced Training requirements or is outside of the 5-year period from application date for applications submitted in 2021 and future years.

14. What is the difference between the State Bar of Texas (SBOT) Collaborative Law Course (formerly known as CLI-TX Spring Conference) and the CDT/CLI-TX Advanced Training?

In general, the State Bar of Texas Collaborative Law Course is geared toward theory and education, and the CDT Advanced Training is geared toward practical skill development and training. CDT believes both are important to becoming a highly skilled collaborative professional.

15. Does the Collaborative Track at the Advanced Family Law Course (SBOT) count as Advanced Training?

No; however it will count toward the requirement of 25 additional hours of collaborative education or training.

16. May I count the same year's attendance at the SBOT Collaborative Law Course for both the Collaborative Law Course requirement and the 25 hours additional collaborative education or training requirement?

No. You may not count a specific year's attendance at the SBOT Collaborative Law Course toward both the Collaborative Law Course attendance requirement (3 out of the last 5 years) and the 25 hours additional collaborative education or training requirement. So, if you are reporting attendance at the Collaborative Law Course in 2015, 2016 and 2017 toward your 3 Collaborative Law Courses in the last 5 years, then you may not also count the 2015, 2016 or 2017 Collaborative Law Course toward the 25 hours additional collaborative education or training.

17. I have attended the SBOT Collaborative Law Course more than 3 times in the last 5 years. Can I count that?

Yes. Any attendance at the SBOT Collaborative Law Course in the last 5 years, in addition to the requisite 3, may count toward the 25 hours additional collaborative education or training requirement. Using the last example, if you have attended the Collaborative Law Course every year beginning in 2016, and you have reported the 2016 and 2017 courses toward your Collaborative Law Course requirement, then you may count attendance at the 2018 and 2019 Collaborative Law Course toward your 25 hours additional collaborative education or training requirement.

18. Can I count collaborative practice group meetings as part of my additional hours of required training and education?

You may count practice group meetings only if they are officially approved as continuing education for purposes of your licensure or certification as a professional.

19. If I was an Instructor or Trainer at a collaborative training, seminar or course, do those hours count toward the 25 additional hours of collaborative education or training requirement?

Yes. Serving as an Instructor or Trainer does count toward the 25 additional hours of collaborative education or training requirement but only to the extent of the hours of credit given to the attendees.

20. Can I count continuing education that is not specifically labeled “collaborative” toward my 25 additional hours of collaborative education or training?

The Credentialing Committee understands that each profession has different continuing education requirements and brings different skills to a collaborative team. If you believe that you have obtained continuing education or training that directly relates to your collaborative practice but is not labeled specifically as collaborative education or training by the sponsoring organization, please identify the course or program and explain how such program is directly applicable to your collaborative practice in the last column of the table included in the application. The Credentialing Committee is composed of attorneys, financial professionals and mental health professionals, and their decision regarding the applicability of any such program as collaborative education or training will be considered. The decision as to whether or not to give credit to such programs toward the 25 hours additional collaborative education or training requirement is up to the discretion of the Credentialing Committee, whose decision is final.

21. What constitutes Leadership and Service for the Master Credentialed Collaborative Professional application?

Leadership and service are based upon an applicant’s contributions to the collaborative community over the course of his/her career prior to application. It is not possible to quantify this requirement. The Credentialing Committee is looking for significant service, dedication and leadership by the applicant, which in most instances will require leadership and service in more than one activity.

Leadership and significant service improves the quality of the collaborative community, whether it be on a local, state, national or international level, and may include:

- Committee member or chairman of local or statewide practice group or collaborative organization
- Trustee of CDT, IACP or local collaborative organization
- Leadership role in Collaborative Section of local or state bar organization
- Author of blog, newsletter, book or other publication promoting collaborative divorce
- Trainer or speaker at conference, meeting or workshop promoting collaborative divorce
- Mentor in the CDT Mentoring Program
- Course Instructor on collaborative divorce for graduate or paralegal program

22. How will I know if CDT received my application and fee?

When CDT receives your mailed or delivered application, we will send an email acknowledging receipt. If you do not receive your confirmation email within 7 business days of mailing or delivering your application, please contact CDT to make sure we have received your application.

23. When will I find out if my application has been approved or denied?

The Credentialing Committee will send out a letter to each applicant, by the end of January following the application deadline, letting the applicant know if his or her application has been approved or not. It is possible that applicants for Master Credentialed Collaborative Professional may not qualify at the Master Credentialed level, but will qualify for Credentialed Collaborative Professional that year. In such instance, the applicant will be credentialed at the Credentialed level even if the application is for Master Credentialed. Please do not contact CDT about the status of your application during the interim period between the time you submit your application and receipt of your letter, except to notify us of a change in your contact information. If you have not received a letter regarding your application by February 15, you may contact CDT about the status of your application.

24. If the Credentialing Committee does not approve my application, is there an appeal process?

No, there is no appeal process. When submitting the application, every applicant agrees to the stated Terms and Conditions that acceptance for credentialing is within the sole discretion of Collaborative Divorce Texas, and that the decision of the Credentialing Committee is final. Although the requirements and application process are demanding, they are objective. If you meet the requirements, you will be credentialed. All applicants who are not accepted as a Credentialed or Master Credentialed Collaborative Professional are encouraged to apply again when they meet the standards.

25. If I cure any defects in my application after my application is submitted but before the next application deadline, can there be a deferred acceptance of my application or do I need to apply again the next year?

There will be no deferred acceptances. Once you are able to cure any defects in your application or satisfy any missing requirements, you must apply again. Collaborative Divorce Texas does not retain applications for consideration beyond the application year in which it was submitted. If you are applying again, please update your application and make sure that all information is updated and current and meets the deadline requirements for the new application year.

26. Will I receive my documents back after the application process has been completed?

No, you will not receive back any documents. Please keep a full copy of your application and every document that you submit as an attachment to the application. At the end of the review process, all applications will be shredded, along with all supplemental documentation. No documents will be retained for future applications, and it will be the responsibility of the applicant to re-submit his or her application if approval is not granted.