License renewal and CE audit

A practical California working record - editable in Word

USE IT THIS WAY	DO NOT MISTAKE IT FOR THIS
Start early in a two-year license cycle and complete before certifying renewal compliance.	This cannot decide whether a particular course, provider, waiver, or exemption qualifies.

Working record

Prepared by	
Reference (no names)	
Date opened	
Next review date	

Six review points

1	**[ ] Confirm the renewal window** Record the license expiration and the dates defining the current renewal period. **Your record:** _____ **Source:** BBS: manage a license or registration
2	**[ ] Total all accepted hours** List each course separately and reconcile the total against current Board requirements. **Your record:** _____ **Source:** BBS: continuing education
3	**[ ] Separate recurring topics** Identify law-and-ethics work and any other topic required each renewal. **Your record:** _____ **Source:** BBS: continuing education
4	**[ ] Check one-time requirements** Record whether telehealth, suicide-risk, or other current one-time requirements apply and how they were satisfied. **Your record:** _____ **Source:** BBS: continuing education
5	**[ ] Verify providers and evidence** Keep the Board-accepted-provider basis and completion certificate for each course. **Your record:** _____ **Source:** BBS: continuing education

6	**[ ] Certify only after reconciliation** Resolve gaps before submitting and retain the audit with the underlying certificates. **Your record:** _____ **Source:** BBS: manage a license or registration

Close the loop

Decision / next action	
Owner	
Due date	

Controlling sources

- BBS: manage a license or registration
- BBS: continuing education

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