

THE LEGAL EAGLE

The latest news and updates for our members.



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Lunch and Learn

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DATE	April 19, 2018
SUBJECT	Dinner Meeting and 78th Annual Installation of Officers: What the What?! - When Your Non-Criminal Law Attorney Decides to Handle a Criminal Matter



DATE	May 17-20, 2018
SUBJECT	LSI Annual Conference North Hollywood, CA

President's Message

By: Brenda Bracy, CCLS



As my first tenure as President comes to a close, I would like to thank all SLSA members for making my year as President so memorable. I have met a lot of special people and I am thankful for all. I look forward to my second year as President and getting to know everyone better and meeting even more people this year. I am honored to be re-elected as President of such a great organization.

I also want to thank the Executive Board, as well as Committee members who I could not run this organization without. These people put in a lot of time and effort in keeping SLSA running smoothly all year long. Without everyone involved, we would not be able to put on as many events as we do. We are a team, and we have to work together in order to make this organization successful. Together as a team, we can accomplish anything.

I would like to congratulate and introduce the rest of your Executive Board for this year: Kelly Leca, Secretary; Marci Frazier, Treasurer; Jan Ainsworth, Governor; Crystal Rivera, Executive Advisor; and Astrid Furstner, CCLS, Parliamentarian. I am honored to be working alongside such a great group of women. I want to personally thank each of them for their willingness to serve on the Executive Board. We do not have a Vice-President again this year. If you are interested in being a part of the Executive Board, please let me know.

As we begin our next fiscal year, I am again asking members to be a part of a committee. We have several committee chairs who are not going to continue in their respective positions for next year. If you would like to get more involved and be a part of this great organization, please let me know.

It truly takes a village to run an organization of this size. In order to participate in the many community events that we do, we need everyone's participation. SLSA participates in many charitable projects and community events. SLSA has always given back to the community and I hope you will support and volunteer to assist with these projects. In order to be successful and continue to support our community, we need everyone to participate.

I encourage you to come to the monthly meetings to take advantage of the education the speakers provide as well as getting to know other members, as well as obtain MCLE and CCLS credit.

Again, thank you for the opportunity to serve as your President. I hope to see everyone at SLSA events and meetings. Please feel free to contact me if you have any questions, suggestions, or comments to president@slsa.org.



2017 Installation of Officers

ONE IS GREATER THAN EIGHT.

Keais
RECORDS RETRIEVAL

second IMAGE NATIONAL

qds
Quest Discovery Services

RSP & Associates
California's Premier
Litigation Support Company

AMFS
AMERICAN MEDICAL
FORENSIC SPECIALISTS

Lp Legal Partners
OUIST REPORTING RECORD RETRIEVAL

ABOINGOSERVICES
PROTECT


ontellus
Accelerating Insight

Change your approach to record retrieval and analysis with Ontellus.

Eight leading companies have merged to become Ontellus, a revolutionary, nationwide online record retrieval partner that empowers you to:

- Accelerate cycle times
- Improve outcomes
- Focus on strategy
- Achieve industry-leading, SOC2 level security

Competitive advantage becomes yours though better-informed decisions, faster turnaround and expedited case resolution.

Law Office Products and Management



Have you ever wondered why it's called Bates stamping?

HISTORY

The Bates Automatic Numbering-Machine, or **Bates stamper**, is named after the late 19th century inventor **Edwin G. Bates** of New York City. He obtained several United States patents for the device from 1891 to 1901 and the patents were assigned to the Bates Manufacturing Company. The earliest patent claimed a "new and useful improvement in Consecutive-Numbering Machines." Bates' objective was "generally to increase the effectiveness, simplicity and compactness of machines of this general character." Each time the machine was pressed down onto a sheet of paper, a rotating wheel was moved incrementally. The original machine described by Bates allowed numbering with a four-digit sequence, ranging from 0000 to 9999. For example, page 852 in a document set would be 0852. Courts and law firms quickly adopted this system.



General Binding Corporation (GBC) acquired Bates Manufacturing Company in 1993. As of 2011, Bates numbering machines are sold by Advantus Corporation of Jacksonville, Florida, which acquired the product line from GBC.

Bates numbering is commonly used as an organizational method to label and identify legal documents. Nearly all American law firms use Bates stamps, though the use of manual hand-stamping is becoming increasingly rare due to the rise in electronic numbering — mostly in Portable Document Format (PDF) files rather than printed material. During the discovery phase of litigation, a large number of documents might require the use of unique identifiers for each page of each document for reference and retrieval. Bates numbering, named for the Bates Automatic Numbering-Machine, assigns an arbitrary unique identifier to each page. Such identification may be solely numeric or may contain a combination of letters and numbers (alphanumeric). There is no standard method for numbering documents, nor is there a standard type face used for such numbers.

Manual Bates stampers use a self-inking mechanism with four to seven numbered wheels. Some stampers allow for consecutive, repeat, duplicate, and triplicate numbering.

Self-adhesive labels printed with Bates numbers are common today, as is electronic discovery (eDiscovery) software that can electronically "stamp" documents stored as computer files by superimposing numbers onto them. The Bates Automatic Numbering-Machine is being increasingly replaced by such software, except in cases where electronic versions of the documents are not available or are not practical to produce.

LOOK AGAIN! IT'S A WEAPON

No, it's not just a numbering machine. Not to the offices humming with war work—not to the men in our fighting forces—not to government offices here and abroad. There, and in scores of other instances, a Bates product is a vital weapon of war...it provides the speed and efficiency that victory demands.

With Bates products so busy in "war work," the supply for civilian use is strictly limited. That calls for proper care... conservation...making the most of the durable quality built into every Bates product.

Meanwhile, Bates-trained workers—by concentrating their skills on vital war production—help speed the day of Victory. Then men and materials will again be available for providing you with Bates products in unlimited quantity.

Bates Products are sold by good stationers and rubber stamp dealers everywhere. They have been the standard of quality for over 50 years. The Bates Manufacturing Co., Orange, N. J.

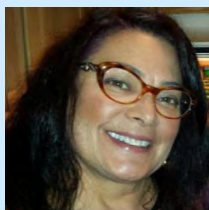
Bates

Numbering Machines, Staplers, Perforators, List Finders, File Fasteners, ManKee Stamp Pads, Etc.

BATES NUMBERING MACHINE

Governor's Report

By: Jan Ainsworth



LSI's Third Quarterly Conference was held on February 23-25, 2018, at the Knotts Berry Farm Hotel in Buena Park, California. Three SLSA members were in attendance (50 CAPs pts/ea - 150); 10 CEC/LSS seminars were attended (50 pts/ea - 500); SLSA chairpersons responded to 14 LSI Quarterly Directives in a timely manner (50 pts/ea - 700) for a total of CAPs earned at February Conference in the amount of 1,350.

CAPs TO DATE: 45,000.

The 2017-2018 Chapter Achievement Contest is in its final quarter. The contest runs from May 1, 2017 through March 31, 2018. The entry form can be found on the LSI website under the Members Only section.

The Board of Governors meeting convened Saturday at 9:00 a.m.; 26 governors were present and there was a quorum. Committee Chairs gave their respective reports. Thereafter the following announcements were made:

President: The Minutes of the November 2017 Quarterly Conference were timely mailed and approved as corrected. The new chair for the CCLS Certifying Board is April Ignitis.

Vice President: Last year LSI ended the fiscal year with 1,435 members. The total for the end of the third quarter stands at 1,328. Last year at this time, we ended the third quarter at 1,359.

The LSI Rock Star Marketing Committee is busy at work coming up with a marketing plan to get ready for its new membership categories – Student and Associate memberships will begin on May 1, 2018.

LSI has accepted the following bids for upcoming conferences:

November 2018

Santa Clara County LPA - November 8-11, 2018
- Silver Legacy, Reno, NV
\$148.65/single/double / \$120 scrip

May 2019

Alameda County LSA - May 15-19, 2019 -
Doubletree Hotel - Pleasanton, CA
\$159/single/double / \$135 scrip

August 2019

Stockton/San Joaquin County LSA
at the Stockton Hilton

November 2019

San Francisco LSA in the Chinatown District

May 2020

Sacramento LSA at the Arden Hilton

Saturday's Board of Governors meeting recessed at 2:56 p.m., reconvened Sunday morning with a call to order at 9:35 a.m., roll call dispensed, and we adjourned at 10:05 a.m. until we meet again at the 84th Annual Conference, May 17-20, 2018, at The Garland in North Hollywood, hosted by San Fernando Valley LSA.



"TEAMWORK—EVERYTHING IS AWESOME WHEN YOU'RE PART OF A TEAM"

SAN FERNANDO VALLEY LEGAL SECRETARIES ASSOCIATION
 MAY 17-20, 2018 – 84TH LSI ANNUAL CONFERENCE
 THE GARLAND HOTEL – NORTH HOLLYWOOD, CALIFORNIA
 CONFERENCE REGISTRATION FORM

NAME (ON BADGE): _____
 MAILING ADDRESS: _____
 CITY/STATE/ZIP: _____
 HOME PHONE: _____ WORK PHONE: _____
 E-MAIL ADDRESS: _____
 LOCAL ASSOCIATION: _____ LSA/LPA (FULL NAME)

PLEASE CHECK IF APPLICABLE AND INCLUDE TITLE: PLEASE CHECK IF YOU ARE:
 STATE OFFICER _____ GOVERNOR CCLS PLS
 STATE CHAIRMAN _____

SCRIP (INCLUDES REGISTRATION, WELCOME RECEPTION, BANQUET AND BRUNCH)
 POSTMARKED ON OR **BEFORE APRIL 18, 2018** \$167.00 \$ _____
 POSTMARKED **APRIL 19, 2018 OR LATER** \$177.00 \$ _____

INDIVIDUAL TICKETS:
 REGISTRATION BY APRIL 18, 2018 _____ @ \$25.00 \$ _____
 REGISTRATION APRIL 19, 2018 OR LATER _____ @ \$35.00 \$ _____
 WELCOME RECEPTION (FRIDAY) _____ @ \$30.00 \$ _____
 GOVERNOR'S LUNCHEON (FRIDAY) _____ @ \$56.00 \$ _____
 PRESIDENT'S LUNCHEON (FRIDAY) _____ @ \$56.00 \$ _____
 NEWCOMERS' LUNCHEON (FRIDAY) _____ @ \$56.00 \$ _____
 CCLS LUNCHEON (SATURDAY) _____ @ \$56.00 \$ _____
 SATURDAY NIGHT BANQUET _____ @ \$78.00 \$ _____
 _____ CHICKEN _____ FISH _____ VEGETARIAN
 SUNDAY BRUNCH _____ @ \$44.00 \$ _____
 TOTAL AMOUNT ENCLOSED \$ _____

SPECIAL DIETARY NEEDS: _____

PLEASE MAKE CHECKS PAYABLE TO: **2018 ANNUAL CONFERENCE FUND**
 MAIL TO: Mae Chester, SFVLSA - P.O. Box 10531, Burbank, CA 91505



Thurgood Marshall and other members of the N.A.A.C.P. legal defense team who worked on the Brown v. Board of Education case.

FOR GENERAL INFORMATION CONTACT:
 REGISTRATION CHAIR – LAURELYN BERGFELD
 (818) 395-2490 laurelyn.bergfeld.ccls@gmail.com

NO REFUNDS AFTER MAY 10, 2018



**“TEAMWORK—EVERYTHING IS AWESOME WHEN
YOU’RE PART OF A TEAM”**

SAN FERNANDO VALLEY LEGAL SECRETARY ASSOCIATION
MAY 17-20, 2018 – 84TH LSI ANNUAL CONFERENCE
THE GARLAND HOTEL – NORTH HOLLYWOOD, CALIFORNIA

HOTEL REGISTRATION FORM

NAME: _____
 MAILING ADDRESS: _____
 CITY/STATE/ZIP: _____
 HOME PHONE: _____ WORKPHONE: _____
 E-MAIL ADDRESS: _____
 LOCAL ASSOCIATION: _____ LSA/LPA (FULL NAME)
 ARRIVAL DATE: _____ DEPARTURE DATE: _____

ACCOMMODATIONS: (PLUS APPLICABLE TAXES AND FEES):

- SINGLE/DOUBLE: \$188.00
 TRIPLE: \$188.00
 ROLLAWAY FEE: \$ 25.00

OVERNIGHT PARKING: SELF PARKING: \$22.00 PER DAY
 VALET PARKING: \$27.00 PER DAY
 DAILY PARKING: SELF PARKING: \$12.00 PER DAY
 VALET PARKING: \$18.00 PER DAY

RESERVATION CUT-OFF: April 25, 2018

PLEASE CALL HOTEL DIRECTLY FOR RESERVATIONS, (800) 238-3759. USE CODE “**LSI**” TO IDENTIFY YOURSELF AS BEING A PART OF LSI IN ORDER TO GET THE GROUP RATE.

**FOR GENERAL INFORMATION CONTACT:
 REGISTRATION CHAIR – LAURELYN BERGFELD, CCLS -
 (818) 395-2490**



Member News

By: Crystal Rivera



Membership renewals are due May 1 and considered late June 1. Updated forms will be posted on SLSA's website after April 19, 2018.

Welcome, and congratulations to the following new members of SLSA.

ACTIVE MEMBERSHIP

Richard Cea – Richard is a legal secretary at Greenberg Traurig, LLP, and has been employed as a legal professional since 2016. He specializes in business/corporate and legislative law. He celebrates his birthday on July 25.

Rosanna Keenan – Rosanna is the President/Owner of ASAP Legal Services, LLC, and has been employed as a legal professional for over 30 years. She specializes in administrative, appellate, construction, and admiralty law, arbitration, law office management, and litigation. She celebrates her birthday on May 28, and enjoys writing, dressmaking, walking, and boating.

Rhonda Ladrido – Rhonda is employed as a legal assistant at Eric Ratinoff Law Corp, and has been employed as a legal professional since 2001. She indicates that she was a previous member of SLSA in 2007. She specializes in litigation. She celebrates her birthday on February 18.

HONORARY MEMBERSHIP

At SLSA's February 2018 Federal Annual Court Updates dinner meeting, Honorary Membership was bestowed upon Wim van Rooyan. Wim is a Career Law Clerk at the United States District Court, Eastern District, and has been a guest speaker at SLSA's Federal Court Updates dinner meetings for many years, and we hope he continues to be a part of our speaker panel.



CONDOLENCES

To LSI Executive Secretary and SLSA Past President **Lynne Prescott, CCLS**. Lynne's father, Billy Prescott, passed away on January 24th. Lynne was not aware that her father had even been ill, so she was not prepared for his passing. Graveside services were held in Alabama. Billy was Lynne's world for a large portion of her life, and she was very attached to him. He took three small children (Lynne, her brother, and sister) and raised them at a time when men were typically not awarded full custody, especially in the Deep South. When they all found out that he was not, in fact, their biological father about 10 years ago, the first thing he said was that he would adopt all of them if he had to because he didn't want anyone to ever again tell them that they weren't his. That's the kind of man Lynne's father was. She says she owes so much of who she is to her father and is extremely heart broken. Cards may be sent to Lynne at: 1847 Andross Avenue, Yuba City, CA 95993.

To LSI Administrator, **Kim Oreno**, whose father passed away on March 4th. Cards may be sent to Kim at the Corporate Office: 2520 Venture Oaks Way, Suite 150, Sacramento, CA 95833.

To LSI's Professional Liaison/Day-in-Court Chair and Placer County LPA member, **Rachel Malerbi**, whose father passed away in his sleep on March 14th. Cards may be sent to Rachel at: 762 Courtyards Loop, Lincoln, CA 95648.

Happy Birthday!!

March

Patricia Day - March 2
 Elizabeth Madden, CCLS - March 4
 Beth Flure - March 7
 Shannon Kline - March 9
 Jeanette Maldonado Coss - March 10
 Christina Will - March 18
 Elizabeth Rose - March 20
 Tere Wade - March 22
 Michelle Chavez, CCLS - March 24



April

Casie Campbell - April 3
 Karen Zeitvogel-Benzler - April 7
 Shelby Hogan - April 9
 Debbie Cervantes - April 10
 Luke Patterson - April 12
 Katelyn Hoffman - April 16
 Jean Wright - April 16
 CoSandra Pollard - April 17
 Rebecca Lerma - April 19
 Suzanne MacDonald - April 22
 Kimberly Bogie - April 30



January State Day in Court

By: Rebecca Lerma

SLSA was honored to have representatives from Placer County Superior Court, Sacramento County Superior Court, Sutter County Superior Court, and the Third District Court of Appeal as our guests for the 2018 Annual State Court Updates dinner meeting.

Here are a few of the updates they spoke about:

Civil Jury Voir Dire

Code of Civil Procedure section 222.5 was amended. It outlines the voir dire process, and initial examination of prospective jurors to be conducted by the trial judge.

Service of Summons and Complaint

Code of Civil Procedure section 415.20 was amended. Service of a summons and complaint may now be affected through a commercial mail receiving agency. This means that defendants who attempt to evade service by using a FedEx or similar commercial facility as their business address will no longer be able to do so. This amendment cross-references subdivision (d) of section 17538.5 of the Business and Professions Code which outlines the agreement the commercial mail facility must enter into with their customer which authorizes them to act as their agent for service of process.



Brandi Burke (Placer), Jamie Gonsalves (Placer), Amy Malone (Sacramento), Shana Simpson (Sacramento)



Rebecca Lerma and Colette Bruggman (Court of Appeal)



Kathy Wojnarowski (Court of Appeal) and Stephanie Hansel (Sutter)

Electronic Service

Code of Civil Procedure section 1010.6 was amended.

This section allows any trial court, by local rule, to require electronic filing and service in civil actions. It provides the framework for electronic filing with the courts and electronic service. It outlines how you can affirmatively consent to electronic service for any cases filed on or after January 1, 2019. A judicial council form will be developed for this purpose.

For those courts offering electronic service, service by 11:59 p.m. will be deemed filed on that court day (this deadline was previously the close of business at the court's filing counter). If a document is required to be served by certified or registered mail, electronic service of the document is not authorized.



Shana Simpson (Sacramento) and Brenda Bracy, CCLS

January State Day in Court, continued

Electronic Proof of Service

Code of Civil Procedure section 1013b was added. This outlines the information you need to include in a proof of service for electronic service.

County Recorder Fees

Government Code section 27388.1 was added. It adds a \$75 fee to most real estate recordings.

Recoverable Costs

Code of Civil Procedure section 1033.5 was amended. You may now recover costs for the electronic presentation of exhibits, including costs of rental equipment and electronic formatting.



Jessica Colgan and Jessica Patton
Day in Court Committee Members



Corene Rodder
SLSA Reception and Registration Chair

Judicial Council Forms

Of note for civil/appellate cases, new/revised judicial council forms for 2018:

- The request for entry of default form has been revised and split into two. One for Fair Debt Buying Practices Act cases, and one for other civil cases.
- The Memorandum of Costs after Judgment form has been updated.
- There is a new Information Sheet for Calculating Interest and Amount Owed on a Judgment which provides instructions on how to properly calculate costs and interest.
- The Writ of Execution form has been updated.
- On the appellate side, there is a new Proposed Statement on Appeal, and revisions to Appellant's Notice Designating Record on Appeal (Unlimited); Appellant's Notice Designating Record on Appeal (Limited); and Information on Appeal Procedures for Limited Civil Cases.

January Vendors



Fujitani Consulting



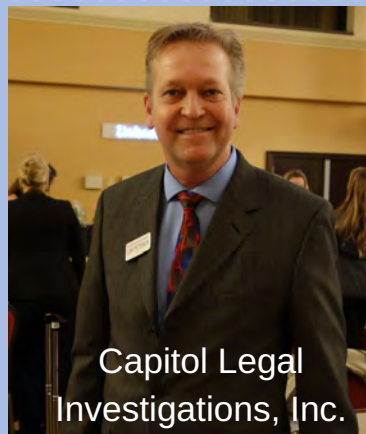
Nationwide Legal



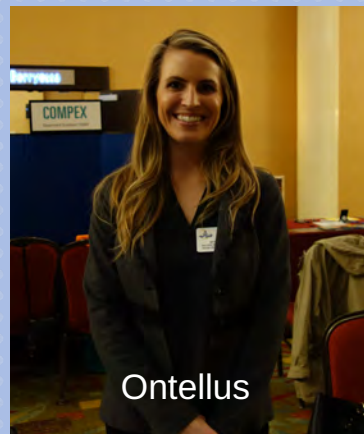
Sacramento Placement Services



ACE Attorney Service



Capitol Legal Investigations, Inc.



Ontellus



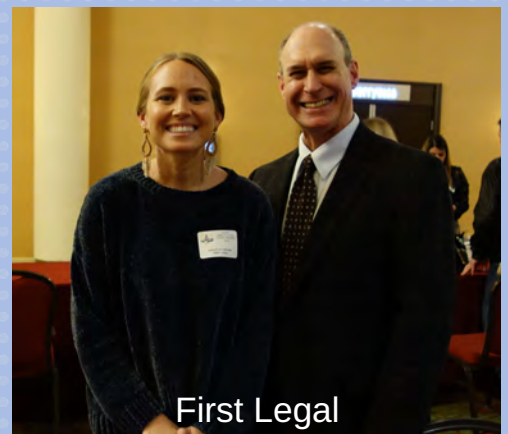
Atkinson-Baker



One Legal



95814 Digital



First Legal



Veritext



Esquire Deposition



Litili Medical & Liability Experts



February Federal Day in Court

By: Rebecca Lerma

Sacramento Legal Secretaries Association presented its 2018 Federal Day in Court event to provide attendees with 2018 court updates. SLSA was honored to have guest speakers from the Eastern District Court attend, including Judge Kimberly J. Mueller.

Judge Mueller prefers in person appearances, especially for local attorneys. She does not like when firms send contract attorneys or attorneys not familiar to the case to an appearance. She also pays attention to how the attorneys interact with each other. She has asked attorneys before whether they have even spoken to each other before going up to argue. She threatens sanctions far more often than she issues them, but will do it if she sees someone repeatedly ignoring the rules or orders. With respect to the sealing of documents, she cautions that we should think twice about even asking for it. It is usually not necessary and can be remedied by redactions. Her three rules are: 1. Show respect for the tribunal (FRCP Rule 11b is touchstone for her); 2. Achieve excellence - good writing is re-writing; and 3. Remember that she is a generalist and the attorneys should be the specialist. Help her by providing the key facts and law and a roadmap of where you want her to go and how that is supported by the facts and law.

The courtroom deputies, and career law clerk, Wim van Rooyen, provided the following reminders:

- If you are asking for an extension of a deadline, include the docket number where the original deadline was issued in the proposed order.
- Notices of related cases should be filed early in both cases. Typically the oldest case number judge decides whether to relate the cases.
- They will not approve any stipulated protective orders where the attorneys decide what needs sealed. They typically will not approve any provision for continued jurisdiction.
- It is okay to use the Northern District model protective order but be sure to change the local rule references first.
- If you modify a 9th Circuit model jury instruction you must specify why you did and add authority.
- Scheduling conference and discovery deadlines are not automatically stayed pending decisions on Motions to Dismiss. If you want it stayed, you must file a motion. Proposed orders should not contain any macros, firm logos, graphics, or proofs of service.



(L to R) Brenda Bracy, CCLS, Judge Kimberly J. Mueller, Wim van Rooyen - Career Law Clerk, Cathy Waltz - Bankruptcy Court Support Specialist, Rebecca Lerma

February Federal Day in Court, continued

- Sur-Replies and Supplemental Declarations should only be used in very rare instances - i.e., a recent change in the law - and are otherwise highly discouraged.
- Do not repeatedly call for a status update on a pending motion/order. If it has been longer than 6 months then it is okay to call.
- Before calling the courtroom deputy, check standing orders and the initial scheduling order. Do not call the Judge's judicial assistant.
- Motions for TROs - If you delay or strategically wait for Friday/before holiday weekend they may be denied for failure to be diligent in seeking relief. Make sure you spell out the true emergency in the papers and the date that any action will be taken.
- You can request a live scheduling conference if you're having issues meeting and conferring with opposing counsel.

Lastly, note the following general updates:

- Eastern District new filings were slightly down in 2017 (-.4%) and pending matters went down by 15.4%. The median time to make it to trial is 29 months in the Eastern District.
- There is a revised form for consenting to a magistrate judge - a standard one for consent for all purposes and a limited one for consent for a specific dispositive motion.
- The only revision to the Eastern District Local Rules relates to bonds.
- The Eastern District Bankruptcy Court however underwent major revisions. A redline is available on the Court's website.

*thank
you*

THANK YOU TO OUR VENDORS...

By: Jessica Colgan

SLSA would like to thank the vendors that participated in our Federal Day in Court Exhibitor Gallery. Without these amazing companies, these events would not be possible. Thank you for your exceptional efforts, resources and education and making this event such a success. Members of SLSA always enjoy meeting and/or reminiscing with representatives from your businesses, some of which they have used for years or are considering using for the first time. Thank you again for always supporting our Association and we look forward to working with you in the future.

- **Capitol Digital & Califorensics**
- **Capitol Legal Investigations**
- **First Legal**
- **Fujitani Consulting, Inc.**
- **Second Image/Keais/Quest**

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YOU'RE SIMPLY THE
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March Dinner Meeting

By: Lynne Prescott, CCLS

Kellie Narayan, Executive Director at Wilke Fleury, was the guest speaker for SLSA's March dinner meeting. She spoke on **"The Future of Legal Staffing/The Evolving Role of the Legal Secretary."**

1970-1991 – The Way Things Used to Be

Kelli began by reviewing the way things used to be - - in other words 1:1 attorney-to-staff ratios; shorthand dictation; manual typewriters; and regular personal and telephone contact with clients. This also included more personal assistant-type duties for staff, such as bringing the attorney coffee or lunch, and handling personal errands for the attorney (picking up dry cleaning, buying an anniversary gift for their spouse, etc.). This often led to the secretary or staff member being a "Girl Friday," the person who knew everything and took care of everything in the law office. It also led to deep, personal relationships with a great sense of loyalty to the attorney, as well as clearly defined roles and authority structure. While all of those things were great and had their place at the time, what wasn't so great was that the secretary developed skills based on the boss' needs, and not necessarily in keeping with changes in the law or the legal marketplace.

1991-2018 – What Changed?

Technology! Human Resources. Equal Opportunity. FMLA/CFRA. Technology! Workers' Compensation. Technology! Anti-Harassment. SDI/PFL. Technology! (You get the picture.)

Today's legal environment typically reflects attorney-to-staff ratios of 3:1, 4:1, 5:1, and sometimes more. The legal staff's value is centered more on technological and legal expertise, with ongoing training and education encouraged. Professional boundaries are clearly set out, and human resources management is typically in place to supervise and distinguish professional duties and personal assistant-type requests. Legal support staff are expected to keep up with changes in the law and the legal marketplace, and to keep pace with evolving technology.



Lynne Prescott, CCLS and Kellie Narayan

2018 and Beyond – The Legal Secretary of the Future

The legal secretary of the future will have a paralegal certificate, a B.A. degree, and exceptional technology skills. She/he will continue to learn and adapt to change, and will likely stay at each firm for a period of two to five years and then move on. Kellie noted that the problem with this is that generally these employees want to achieve status and economic growth sooner (e.g., they want a title and higher paycheck without putting in the years to receive it). Few want to be a legal secretary, while many want to walk in the door and be a "paralegal." We were reminded of Business & Professions Code section 6450, which clearly defines the terms "paralegal" and "legal assistant," with the admonition that, unless you meet these qualifications under the Code, you should not be using either of those titles.

March Dinner Meeting, continued

There are various models being researched and experimented with regarding legal support roles in the law office. Included among these are the Legal Team model, where the staff member is part of a support team, which may or may not specialize in a particular area of law. Another model is the Hybrid Role, where the staff member is a paralegal who also bills as a timekeeper. The third model is the Case Manager, who supervises others and may be an exempt employee, available 24/7. All of these models have expectations of advanced technological skills and to be able to work remotely on multiple platforms.

Real Questions re the Impacts of Future Staffing Models

- How will the next generation of legal secretaries learn the fundamentals if we are not prepared to train and insist on only hiring “experienced” legal secretaries?
- Will there be a next generation of legal secretaries?
- What about Millennials? How do you hire and retain talent who want to be known, heard and contribute, but immediately want to be ascribed value (even if they do not have the experience to justify it)?
- What does it do to firm culture if the staffing model does not take into account “matching” the relationship of the supervisor to staff and maintain that assignment over time?
- Will incoming talent be solely motivated by a higher salary and acknowledgement without a factor for the rapport – or loyalty-building – in the context of a supervisor/staff relationship?

The legal staff’s value is centered more on technological and legal expertise, with ongoing training and education encouraged.

Futuristic Change? Ready or Not, It’s Coming!

Things to look for in the future: Millennial Leadership; Virtual and Augmented Reality Technology; Online Communities; Artificial Intelligence; Robotics.

Thank you to Kellie for giving us a true eye-opening look at our future!

“The only thing that never changes is that everything changes.” – Louis L’Amour

March Vendor

By: Jennifer Estabrook, CCLS

Our Vendors of the Month for March were Jamie Gooch and Danette Rugg of Aptus Court Reporting. With over 35 years of combined experience in the litigation support business, Aptus provides a one-stop solution for deposition and trial needs. In addition to expert reporting, Aptus also provides a variety of online services. With Aptus, you can take advantage of online calendaring, transcript and exhibit repositories, as well as access to all of your invoices.

Other available services include interpreting, transcription, trial support, videography, video conferencing and streaming, and worldwide conference rooms. Aptus has locations in San Diego, San Francisco, Los Angeles, Riverside, Sacramento, Orange County, Fresno, and Seattle, conveniently located to meet your local court reporting service needs. More information is available at <http://aptuscr.com>.



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Connecting Testimony & Technology Worldwide

March Lunch and Learn

By: Lynne Prescott, CCLS

On March 21, 2018, SLSA held its fourth Lunch & Learn of the year, "Putting the 'Professional' Back in Professionalism," at the Downey Brand law offices in Sacramento. The workshop was led by a panel comprised of Marci Frazier, Corene Rodder, and Lynne Prescott, CCLS.

The workshop was an interactive exchange between the panel and the attendees on what it means to be a professional, using scenarios as object lessons for specific points. The Lunch Lesson covered the following:

- What does Professionalism Mean to YOU? What Professionalism is NOT.
- Professionalism with Coworkers, Clients, and Attorneys.
- Professionalism in Your Work Product (Including handling mistakes and accepting responsibility).
- Maintaining Your Professional Balance.
- Who is Your Professional "Tribe?" (What resources/networks do you rely on?)
- Professional Associations (SLSA, LSI, SVPA, etc.).
- Leaving Your Professional Mark (Who are you mentoring?)



Professionalism is not a bygone, old-fashioned concept. It is something we should all aspire to, willingly embrace, and teach to those who come behind us. Thank you to the panel members, Downey Brand, and the attendees for helping to make this an excellent Lunch & Learn Lesson!

Sacramento Legal Secretaries Association



Dinner Meeting - April 19, 2018

*****NEW LOCATION!!*****

The Old Spaghetti Factory
1910 J Street, Sacramento

5:30 – 6:15 p.m. Meet & Greet

6:15 – 8:00 p.m. Dinner Meeting



What the What?! – When Your Non-Criminal Law Attorney Decides to Handle a Criminal Matter (A Practical Guide for Support Staff)

*Guest Speaker: Kimberly A. Chapman
Messing Adam & Jasmine LLP*

SLSA's 78th Annual Installation of Officers

MCLE & CCLS Credit: Sacramento Legal Secretaries Association is a local association of Legal Secretaries, Incorporated, an approved provider, and certifies that this activity has been approved for minimum continuing legal education credit in the amount of **0.50 hours** by the State Bar of California.

RSVP by Midnight on Sunday, April 15*

Two Ways to Register:

- Online at www.slsa.org under Upcoming Events (Preferred)
- Via e-mail at reservations@slsa.org
(please include menu choice)

\$30 SLSA Members / \$35 Non-Members
Add \$5 after deadline

Make checks payable to "SLSA" and mail to:

Corene Rodder
Registration/Reception Chair 2017-2018
c/o Somach Simmons & Dunn
500 Capitol Mall, Suite 1000
Sacramento, CA 95814

Dinner Menu – Choice of:

- Baked Lasagna
- Tortellini with Alfredo Sauce
- Chicken Marsala

Entrees include bread, salad, dessert, and choice of iced tea, hot tea, coffee, milk, soda, or water.



Thank You to Our Vendor Partner for April!

*Cancellations must be received 48 hours in advance for a refund. No-Shows will be billed.

California Certified Legal Secretary

By: Elizabeth Madden, CCLS

CCLS QUIZ

True or False. The following terms should be hyphenated unless they appear in quoted matter and were not hyphenated in the original. California Style Manual §§ 4:43-4:44.

- | | |
|---------------------------------------|-------------------------------------|
| 1. _____ above-described | 9. _____ I-beam |
| 2. _____ attorney-client relationship | 10. _____ mid-term |
| 3. _____ blood-alcohol level | 11. _____ parent-child relationship |
| 4. _____ case-in-chief | 12. _____ re-examine |
| 5. _____ case-law | 13. _____ tape-recorded |
| 6. _____ co-counsel | 14. _____ well-being |
| 7. _____ co-workers | 15. _____ work-product |
| 8. _____ court-appointed | |

ANSWERS: 1=F; 2=T; 3=T; 4=T; 5=F; 6=F; 7=F; 8=T; 9=T; 10=T; 11=F; 12=T; 13=F; 14=T; 15=F

CCLS VOCABULARY

In rem	Against the thing.
Ex post facto	After the deed is done.
Ex officio	Ex officio By virtue of his office.
Mandamus	Mandamus We command.
Per annum	Per annum For each year.
Compos mentis	Compos mentis Of sound mind.
Erratum	Erratum Error.
Lis pendens	Lis pendens Litigation pending.
Opere citato	Opere citato In the work cited.
Proximo	Proximo In the next month.

Interested in becoming a CCLS?

Take the next step.

There are resources on LSI's website to help you study for the exam! <https://www.lsi.org/ccls-certification/> Study to take the exam and become a well-rounded, confident, marketable employee!





LEGAL SECRETARIES, INCORPORATED

CCLS ON-LINE STUDY GROUP

July 8, 2018 – September 9, 2018

If you are interested in studying for the California Certified Legal Secretary ("CCLS") Exam,** join LSI's CCLS On-Line Study Group. During the classes, all topics covered in the CCLS exam will be reviewed (see *CCLS Information Kit* on LSI website for a description of the sections of the exam).

Lectures (MP4) and materials will be posted no later than 7 pm on Sundays. Students may complete the material at their convenience. Access information will be provided upon enrollment in the classes.

***** NEW *****

Individual modules for each section of the CCLS Study Group are now available!

If you only need to study for a few sections, you may purchase individual modules for immediate upload at any time during the then-current Study Group class. You may also purchase all sections if you would prefer to study at your own pace.

Reminder – all material is intended for individual use only, and not for local association study groups

Students will be provided with homework and handouts. **Students are responsible for providing their own *Law Office Procedures Manual*, *The Gregg Reference Manual* (11th Ed.), *California Style Manual* (4th Ed.), and *Pocket Guide to Legal Ethics*, NO LATER THAN the start of the classes.** Students are also encouraged to have the CCLS Study Guide.

**All examinees must meet eligibility guidelines outlined in the *CCLS Information Kit* on LSI's website.

CCLS STUDY GROUP REGISTRATION

(Please type or print clearly)

Name: _____ Association: _____ LSA/LPA
 Phone: _____ Email: _____

10-Week Study Group:

First time participation: _____ \$100 Members _____ \$150 Non-Member
 Subsequent participation: _____ \$ 50 Members _____ \$ 75 Non-Members

Individual Modules: (\$15 each Members; \$25 each Non-Members)

_____ California Legal Procedure _____ Legal Terminology _____ Legal Computations
 _____ Skills _____ Reasoning & Ethics
 _____ Law Office Administration _____ Ability to Communicate Effectively

Payment: Check # _____ Credit Card # (Visa/MC only) _____
 Expiration Date: _____ Sec. Code: _____

DEADLINE TO REGISTER IS JUNE 22, 2018. Send registration to Terrie Quinton, CCLS, LSI CCLS Chair, c/o Duckor Spradling Metzger & Wynne, 101 W. Broadway, Ste. 1700, San Diego, CA 92101 or email lsiccls@outlook.com (with credit card information). You may also pay via PayPal at www.lsi.org. **NO REFUNDS AFTER JULY 2, 2018.**

STRIVE FOR SUCCESS – BE A CCLS!



WEBINAR OPPORTUNITIES!

March 28, 2018

12:00 – 12:30 p.m.

\$15

Stamping...Redacting...Converting... Oh My! - Get up to speed on converting, bate-stamping, redacting, combining documents, etc. while using a PDF program such as Acrobat or Nuance. This half-hour webinar will provide you with tips on how to work with a PDF program in order to save you time from standing at the copy machine.

March 29, 2018

12:00 – 1:00 p.m.

\$25

Everyone's favorite...Table of Contents and Table of Authorities - No more cutting and pasting from briefs! This one-hour webinar will take you step by step, through the process of creating and generating a table of contents and authorities using Word.

Presented by NextGen 

ONLINE REGISTRATION AND PAYABLE AVAILABLE AT WWW.LSI.ORG

<p>March 28, 2018 Stamping...Redacting...Converting...Oh My!</p> <p style="text-align: center;">\$15</p> <p style="text-align: center;"><input type="checkbox"/></p>	<p>March 29, 2018 Everyone's favorite...Table of Contents and Table of Authorities</p> <p style="text-align: center;">\$25</p> <p style="text-align: center;"><input type="checkbox"/></p>
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REGISTRATION

Name: _____ Email: _____

Telephone: _____

Association: _____ LSA/LPA (No abbreviations)

Payment: Check (made payable to LSI) Credit Card or PayPal Available at www.lsi.org

Send completed form and payment to:
LSI, 2520 Venture Oaks Way, Suite 150, Sacramento, CA 95833, info@lsi.org

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