

The Legal Eagle







Contents

- 3 President's Message
- 5 Governor's Report
- 8 Member News
- 9 Bunco!
- 10 Save the Dates
- 11 Parliamentarian's Corner
- 12 August Conference Flyer
- 13 Legal Specialization Section Seminars
- 15 July Dinner Meeting Recap
- 18 July Vendor of the Month
- 19 Legal Procedures / Court Updates
- 22 California Certified Legal Secretary
- 28 SLSA Committee Members
- 29 SLSA Executive Board



Photo Credit Dawn Forgeur, CCLS

Current and Upcoming Events

- | | | | |
|---|---|---|--|
|  Aug 14 | SLSA Executive Board Meeting |  Aug 18 | Legal Specialization Section Seminars
Stockton Hilton |
|  Aug 16 | SLSA Dinner Meeting
LD to register w/no late charge: August 12 |  Aug 25 | Bunco!
Register online now |
|  Aug 18 | LSI Quarterly Conference
Stockton Hilton |  Sep 20 | SLSA Dinner Meeting
Register w/no late charge: September 16 |

REACH RECORD HEIGHTS

As the nation's largest, privately-held records retrieval provider, Ontellus leverages decades of experience, cutting-edge technology and data intelligence to deliver impactful products and client-centric services within industry-leading turnaround times.

- ✓ 40+ Years of Industry Knowledge & Experience
- ✓ Suite of "Smart" Tools: SmartChron™, SmartOrg™ and Simplified SmartPricing™
- ✓ Nationwide Custodian Database
- ✓ Secure Records Delivery™ Application
- ✓ Claims System Integrations
- ✓ Legal Forms Automation
- ✓ Largest In-House Legal Team

Learn More
www.Ontellus.com

**ontellus**

**REVOLUTIONIZING RECORDS RETRIEVAL &
DATA INTELLIGENCE**

President's Message

By: Brenda Bracy, CCLS

The legal field is a challenging area to work in, but it can also be brutal at times. We are expected to know everything about our jobs and sometimes work under extreme conditions and still meet various deadlines. This is one of the things that makes our Association so invaluable. SLSA has so much to offer by way of training and networking. I encourage all members to attend our monthly meetings in order to keep up to date on all of the changes that take place in the various courts and areas of law. We have speakers every month that give us invaluable information on various topics that are geared towards keeping us up to date on the laws and how to handle the day-to-day tasks of doing our jobs.

I also encourage members to attend the LSI Conferences and attend classes that LSI offers on various topics which also include invaluable training to keep up to date on today's law. LSI has four conferences a year. There are classes at each of the conferences on various topics. I personally attend classes at each conference and I always enjoy the topics and walk away with great handouts to take home with me. You can find the upcoming conferences and classes on the LSI website at www.LSI.org. LSI's 1st Quarterly Conference is scheduled for August 18-19, 2018, at the Hilton Hotel, in Stockton, California.

One of the biggest challenges of our job is keeping up with the various changes in the courts. This includes both the state and federal courts. The courts are continuously changing the way they file our documents. Unfortunately, each court can be a little different as well. It is up to us to make sure we keep up to date on all of the changes so as to avoid getting our documents rejected. Federal courts have utilized electronic filing for quite a few years now and most of us are pretty confident in their filing system. I prefer federal court filings to state court filings because they are pretty standard and are easier. I have been filing in federal court since the beginning of electronic filing and am very confident in doing so. The state courts are a different story. The state courts are not the same at all, and some are pretty difficult to deal with. They are slowly going into e-filing, but they do not all use the same e-filing systems, and the rules differ from one county to the other.

The best way to keep up with the various e-filing requirements in each county is to utilize one of the vendors that can do it for you. They know the requirements of each county and they take the guessing out of it for you. SLSA was fortunate to have First Legal as our speaker at our July dinner meeting to talk to us about e-filing. Their presentation was very helpful and informative. There were things that I didn't know that I found out during the presentation. My office uses First Legal exclusively for all of our court filings, including e-filing. They are good at what they do and I have no problems with using them. I send them my documents and they send me the endorsed filed copies after they are filed.

Another thing that is helpful to us is doing our own research on the different court requirements. Whenever I have any down time, I pull up the local rules of the courts I am currently filing in. As a rule, I always glance at the local rules of the county before I file anything just to make sure nothing has changed. Local rule changes occur in January and July of each year.

The Board is always available by email or by phone and you can talk to any of us after our monthly meetings. If anyone wants to attend a Board meeting to discuss something, you are always welcome to attend, but I ask that you let me know ahead of time. If you would like to be more involved with the Association this year, feel free to contact me.

I hope everyone has a great summer and you all enjoy some kind of vacation get away. I look forward to hearing about everyone's adventures.

I look forward to seeing everyone at SLSA events and meetings this year. Please feel free to contact me if you have any questions, suggestions, or comments to president@slsa.org.

Sacramento Legal Secretaries Association



Dinner Meeting - August 16, 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



Estate Planning

Guest Speaker:
Silvio Reggiardo, III
President, Sacramento County Bar Association



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 **0.5 hours** by the State Bar of California.

RSVP by Midnight on Sunday, Aug. 12*

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 2018-2019
c/o Somach Simmons & Dunn
500 Capitol Mall, Suite 1000
Sacramento, CA 95814

Dinner Menu – Choice of:

- Stuffed Pasta (Ravioli & Tortellini)
- Chicken Fettucine
- Meat Lover's Treat (Meatballs & Sausage)

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

**Thank You to Our Vendor Partner
for August!**

**Capitol Legal Investigations,
Inc.**

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

Governor's Report

By: Jan Ainsworth

Four SLSA members will be attending LSI's First Quarterly Conference, August 17-19, 2018, at the Stockton Hilton hosted by Stockton San Joaquin County LPA. This Conference is within an easy driving distance and easily attended by you. Please come out and join us! At the upcoming Conference, the Board of Governors will vote on a Proposed Bylaw Amendment submitted by Betty Thomas, Governor, San Gabriel Valley LSA for the purpose of increasing LSI per capita tax by \$10 per year, effective May 1, 2019. Article VI, Section 1 currently reads:

Section 1. Per Capita Tax.

Annual per capita tax payable to LSI shall be \$20 for each active member. Student and associate members shall pay one-half the annual per capita tax paid by active members.

The recommendation is to strike "\$20" and insert "\$30."

If adopted, the Bylaw would be effective May 1, 2019 and read as follows:

Section 1. Per Capita Tax (effective May 1, 2019).

Annual per capita tax payable to LSI shall be \$30 for each active member. Student and associate members shall pay one-half the annual per capita tax paid by active members.

I will inform you of the results in September.

SLSA's Chapter Achievement Program for fiscal year 2018-2019 began April 1, 2018. You can email me your submissions or use the online form at <https://www.slsa.org/chapter-achievement-points-caps-online-submission-form/>. **CAPS To Date: 7,600 points.**



Kelly Leca, Crystal Rivera, Marci Frazier

Editor's Note

The Legal Eagle welcomes letters to the editor, questions, and articles from readers. Please send them to dawn.forgeur@stoel.com. SLSA reserves the right to edit articles and letters sent in for publication. The deadline for all submissions is the Monday after the dinner meeting.

The opinions expressed in any articles or letters published herein are those of the individuals submitting them and not necessarily the views of the officers or editorial staff. This publication may not be reproduced in whole or in part without the express written consent of the President of SLSA.

Chapter Achievement Reporting Form

Each association in LSI participates every year in the Chapter Achievement Points (CAPs) contest, and these points are tracked by SLSA's Governor. This covers activities from April 1, 2018, through March 31, 2019.

Please complete this form and mail or email it to SLSA's Governor, Jan Ainsworth. If you attend a function and are not sure if it applies, include it below on the blank line provided and it will be determined if it applies.

Date of Event Event

- _____ I submitted an article to The Legal Secretary magazine. (50 points)
- _____ I attended an LSI Quarterly or Annual Conference. (50 points)
- _____ I attended an Officer/Chairman Workshop at the Annual Conference.
How many workshops? _____ (25 points)
- _____ I rented a car through Hertz with the LSI discount. (200 points)
- _____ I took the CCLS exam – Test Date: _____. (100 points)
- _____ I passed the CCLS exam – Test Date: _____. (200 points)
- _____ I recertified as a CCLS during the 2018-2019 fiscal year. (50 points)
- _____ I attended another association's monthly meeting, installation, or other function. (50 points)
- _____ I attended an educational workshop or seminar sponsored by SLSA or another local
association. (25 points)
- _____ I attended an educational workshop or seminar sponsored by a Forum, CEB, or
the Rutter Group. (25 points)
- _____ I attended an educational workshop or seminar via webinar. (50 points)
- _____ I am a member of at least one Legal Specialization Section. (50 points)
- _____ I am a member of all six Legal Specialization Sections as of March 31, 2019. (100 points)
- _____ I attended a Legal Specialization Section Seminar at Quarterly or Annual
Conference. How many? _____. (50 points per seminar)
- _____ I submitted an article for use in a Legal Specialization Section newsletter. (50 points)
- _____ I purchased the Legal Professional's Handbook (LPH). (200 points)
- _____ I purchased the Law Office Procedures Manual (LOPM). (200 points)
- _____ I purchased updates to the LPH. (100 points)
- _____ I purchased updates to the LOPM. (100 points)

Name: _____ Email: _____

Sacramento LSA
Attn: Jan Ainsworth, Governor
Murphy Austin, 555 Capitol Mall, Ste. 850, Sacramento, CA 95814
(jainsworth@murphyaustin.com OR governor@slsa.org)

Upcoming Conferences



- August 2018 Quarterly Conference
Stockton Hilton, Stockton
Dates: August 17-19, 2018
Scrip - \$125 / Room - \$134
Host Assn: Stockton/San Joaquin LPA

November 2018 Quarterly Conference
Silver Legacy Hotel & Casino, Reno, NV
Dates: November 9-11, 2018
Scrip - \$120 / Room - \$110
Host Assn: Santa Clara County LPA

February 2019 Quarterly Conference
Viejas Casino & Resort Hotel, Alpine
[Opposite the Viejas Factory Outlet Mall]
Dates: February 15-17, 2019
Scrip - \$150 / Room - \$167.63
Host Assn: San Diego County LSA

May 2019 Annual Conference
DoubleTree by Hilton Fremont/Newark - Newark
Dates: May 15-19, 2019
Scrip - \$135 / Room - \$159
Host Assn: Alameda County LSA

- August 2019 Quarterly Conference
Hilton Los Angeles North/Glendale, Glendale
[Nearest Airport: Bob Hope/Burbank]
Dates: August 15-18, 2019
Scrip - \$182 / Room - \$175
Host Assn: San Gabriel Valley LSA

November 2019 Quarterly Conference
Hilton SF Financial District, San Francisco
[Located across the street from Chinatown]
Dates: November 21-24, 2019
Scrip - \$165 / Room - \$185
Host Assn: Alameda County LSA

February 2020 Quarterly Conference
DoubleTree Hotel, Modesto
Dates: February 21-23, 2020
Scrip - TBA / Room - TBA
Host Assn: Stanislaus County LPA

- May 2020 Annual Conference
Hilton Arden-West, Sacramento
Dates: May 7-10, 2020
Scrip - \$138 / Room - \$149
Host Assn: Sacramento LSA

August 2020 Quarterly Conference
Stockton Hilton, Stockton
Dates: August 21-23, 2020
Scrip - \$135 / Room - \$149
Host Assn: Stockton/San Joaquin County LSA



Member News

By: Crystal Rivera

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

ACTIVE MEMBERSHIP

Sheila D. Brown – Sheila is a practice assistant at Stoel Rives, LLP and has been employed as a legal professional since 1989. She specializes in litigation. She celebrates her birthday on August 27 and enjoys reading, shopping, and skating.

Kathei Courtland – Kathei is a legal secretary at Downey Brand LLP and has been employed as a legal professional since 1990. She specializes in appellate law, litigation, and natural resources. She celebrates her birthday on August 26 and enjoys painting, design, shopping, and animal rescue.

Jaime Gooch – Jaime is a Regional Account Executive for Aptus Court Reporting and has been employed as litigation support for the last four years. She specializes in litigation. She celebrates her birthday on July 13 and she enjoys sports and anything outdoors. She was a member of Fresno County LPA for four years, including three years as 2nd Vice President.

Amber Pharr – Amber is a legal secretary at Spinelli, Donald and Nott, and has been employed as a legal professional since 2016. She specializes in litigation and celebrates her birthday on July 6.

STUDENT MEMBERSHIP

Kobi Wear – Kobi is in records management at Murphy Austin Adams Schoenfeld LLP, and has been employed as a legal professional since October 2017. She specializes in records management. She celebrates her birthday on September 22 and enjoys reading, decorating, shopping, and traveling.

Happy August Birthdays!



Gisele Mitsuk - August 2
 Amy Freeman - August 4
 Susan Heu - August 7
 Marve Breech - August 10
 Shaine Kennedy - August 17
 Mary Taylor - August 22
 Kathei Courtland - August 26
 Sheila Brown - August 27
 Kelly Leca - August 28
 Margarita Jakovas - August 29



Bunco Rules:
Roll. Chat. Repeat.



TACOS
& RAFFLE
PRIZES

AUGUST 25
5:00 - 9:00 PM



BUNCO!

SACRAMENTO LSA



REGISTER
NOW!

WWW.SLSA.ORG

\$20 ON OR BEFORE AUG 17

\$25 AFTER AUG 17/AT THE DOOR
CONVENIENCE FEE ADDED TO CREDIT CARD
PAYMENT ONLINE

550 BER CUT DRIVE, SACRAMENTO
(HWY 5 AND RICHARDS BLVD.)



SAVE THE DATE! SLSA RENO BUS TRIP



Sponsored by
Sacramento Legal Secretaries Association
Saturday, October 6, 2018
7 AM to 7 PM

Destination: The Silver Legacy Resort Casino

Stay tuned! Details to follow!

Open to members & non-members - - must be at least 21 years of age

We will have two convenient pick up locations:

Arden Area – 7:15 a.m. Parking lot Black Bear Diner 1830 Arden Way Sacramento, CA	Citrus Heights Area – 7:30 a.m. Parking lot of the Safeway/CVS 5333 Elkhorn Blvd Sacramento, CA
---	---

Questions???

Corene Rodder, crodder@somachlaw.com
Crystal Rivera, crivera@somachlaw.com

BUNCO

SAVE THE DATE

Hosted by Placer County LPA

October 20, 2018

Parliamentarian's Corner

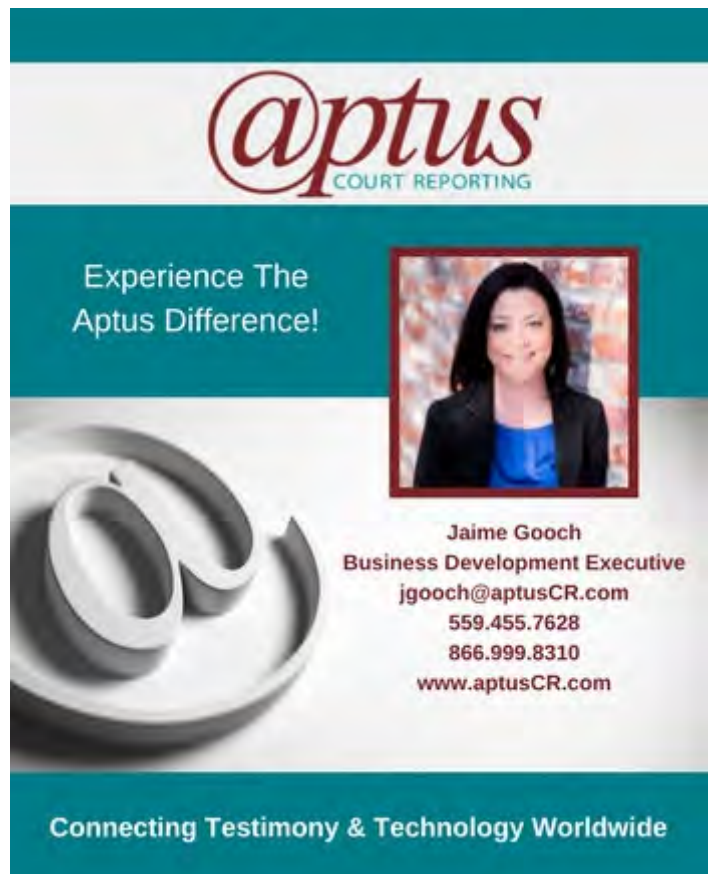
By: Astrid Furstner, CCLS, OCP

Have YOU thought of being a Parliamentarian?

What does it mean to be a Parliamentarian? According to Robert's Rules of Order, the role of the Parliamentarian is to advise. Yes, advise. The Parliamentarian advises the presiding officer in responding to points of order, parliamentary inquiries, and generally to provide advice on matters related to conducting a meeting according to the rules. Only the chair (usually the President) can actually rule on the proper application of the rules, but the chair can ask for guidance in interpreting those rules from the Parliamentarian. The chair can also ask the Parliamentarian to provide an explanation to the group directly. But what does that mean to you? As you may be aware, SLSA is made up of volunteers. This organization, OUR organization, is kept alive and going by those of us who have a common goal – to unite in one association persons engaged in, or interested in, any phase of legal work; to establish good fellowship among members of this Association; to stimulate a high order of business and professional attainment; to further our knowledge of law and its procedure and to uphold its honor and dignity; to further our knowledge of governmental, educational, and public affairs; to create a high standard of ethics among our members and to further the interests of legal secretaries; to cooperate with the various Bar Association, Legal Secretary Associations, and LSI; and to disseminate information and knowledge of interest to our members. Whew! In a nutshell – we come together to network, meet people who are in our profession, learn to grow, share that knowledge, and uphold the foundations of our career to make it better.

How can you help? Easy! Share some of your time. Time is precious. We all know that. Every single person in this organization has someone or something else in their lives other than just work. But, if you joined SLSA, why did you join? This is a voluntary organization. If you come to the monthly meetings, why do you attend? What do YOU get out of it? Are you able to meet new legal vendors? Maybe network and get to know someone else within the field? Perhaps learn a new skill set or enhance your current skill set? If you can help at registration one evening or hand out flyers or introduce the speaker or vendor or if you can sell raffle tickets or simply ask questions at the meeting, is that too much? That's all it takes. Just a few minutes of your time. While you do that, you network and you learn. So, while being a Parliamentarian may not be your thing, there are plenty of other tasks that you can help with. But ... if you do want to be a Parliamentarian, let the President know or ask me. I'm happy to guide you through it and see you spread your own wings and soar!

Until next time ...



@aptus
COURT REPORTING

Experience The
Aptus Difference!

Jaime Gooch
Business Development Executive
jgooch@aptusCR.com
559.455.7628
866.999.8310
www.aptusCR.com

Connecting Testimony & Technology Worldwide

STOCKTON-SAN JOAQUIN COUNTY LEGAL PROFESSIONALS ASSOCIATION


INVITES YOU ALONG FOR A

California Road Trip!

LSI 1ST QUARTERLY CONFERENCE
AUGUST 17-19, 2018

The Stockton Hilton
2323 Grand Canal Blvd.
Stockton, California 95207

CONFERENCE REGISTRATION FORM



Name (as it will appear on badge): _____

Mailing Address: _____

City/State/Zip: _____

Home/Cell Telephone: _____

Work Telephone: _____

Email address: _____

Local Association (please spell out): _____

PLEASE INDICATE IF YOU ARE:

_____ State Officer _____ Governor
 _____ State Chairman _____ CCLS _____ PLS

SCRIP (includes Registration, Welcome Reception, Banquet and Brunch):

POSTMARKED ON OR BEFORE JULY 20, 2018	\$ 125.00	\$ _____
POSTMARKED AFTER JULY 20, 2018	\$ 135.00	\$ _____

INDIVIDUAL TICKETS:

_____ Registration PRIOR to July 20, 2018	\$ 20.00	\$ _____
_____ Registration AFTER July 20, 2018	\$ 30.00	\$ _____
_____ WELCOME RECEPTION (Friday)	\$ 25.00	\$ _____

LUNCHEONS

_____ Presidents' Luncheon (Saturday)	\$ 27.00	\$ _____
_____ Governors' Luncheon (Saturday)	\$ 27.00	\$ _____
_____ Open Luncheon (Saturday) - Open to All	\$ 27.00	\$ _____

CHOOSE ONE: _____ Lemon Grass Chicken Lettuce Wrap or _____ Portobello Mushroom Lettuce Wrap

_____ BANQUET (Saturday Evening) \$ 60.00 \$ _____

CHOOSE ONE: _____ Rib Eye Steak _____ Chicken _____ Vegetable Napoleon

_____ BRUNCH (Sunday) \$ 30.00 \$ _____

TOTAL AMOUNT ENCLOSED \$ _____

Special Dietary Restrictions _____

PLEASE MAKE CHECKS PAYABLE TO SSSJCLPA AUGUST CONFERENCE

RETURN THIS FORM WITH PAYMENT TO REGISTRATION CHAIR:
Jan Kuykendall, 11662 N. Ham Lane, # 41, Lodi, CA 95242;

For questions call Jan Kuykendall evenings at 209 747-4781 or email ks24fanatic@aol.com or
 Colleen Young at 209- 609-4042 or email youngns@comcast.net
NO REFUNDS AFTER AUGUST 1, 2018

August 18, 2018

Deadline to register without late fee: August 13
Section Member - Free | All others - \$15



11:00AM - 12:00PM

Probate and Estate Planning

Estate Planning 101

Jeffrey E. Prag
Law Offices of Jeffrey E. Prag

Law Office Administration

Government Claims - Do's and Don'ts: A Look Into the Gov. Code

Charles Torretta, SCLA, MCSA
George Hills Company, Inc.

3:00PM - 4:00PM

Federal Law

Cannabis: State Laws v. Federal Laws

Stephen Munkelt, Esq.
Munkelt Law Office

Criminal and Family Law

Recent Criminal Law Developments

Adam Grace, Esq.
Deputy Public Defender, San Joaquin County

4:30PM - 5:30PM

Specialty Law

The Basics of Corporate Entities in CA: What's Available and What's the Differences

Patricia A. Wenthe
Legal Document Assistant

Civil Litigation

Subrogation

Tammy L. Hunt, CCLS
Subrogation Supervisor, George Hills Company, Inc.

REGISTER ONLINE AT WWW.LSI.ORG

The Legal Specialization Sections are a program of Legal Secretaries, Inc., an approved provider, and certify that these seminars have been approved for minimum MCLE/CLE credit of 1.0 hours each, by the State Bar of California unless otherwise specified.

Legal Specialization Sections Seminars
THE HILTON STOCKTON • 2323 GRAND CANAL BLVD.

Game Night at Conference!



Interassociation Game Night

Please join us for fun and friendship.
Test your knowledge on California landmarks, songs, and games!



Host Associations: Contra Costa County LPA, Desert Palm LSA, Los Angeles LSA, Orange County LSA, Placer County LPA, Sacramento LSA, San Diego LSA, San Francisco LPA, and Stanislaus County LPA

When: Friday, August 17, 2018, 8-9:30 p.m.

Where: The Stockton Hilton, Stockton
Room TBD

RSVP: Diane Mecca: 209-918-0796, dianemecca@hotmail.com or
Linda Moore, CCLS: 619-723-5336, lmoore561@cox.net

Everyone is welcome to play!

July Dinner Meeting

By: Lynne Prescott, CCLS



Larry Kirlin, Lynne Prescott, CCLS, Jim Pinter

SLSA's guest speakers for the July 19 dinner meeting were Jim Pinter and Larry Kirlin of First Legal. The topic for the program was "California E-Filing Landscape."

It is predicted that over the next 3-5 years, all 58 counties in California will implement some form of e-filing. What that means for those counties, and for those who will have to comply with the e-filing rules and requirements, is still unknown. What is known is that e-filing, with all its benefits, doesn't necessarily mean fast, efficient, or even error-free. All e-filings are still manually reviewed by a court clerk before being accepted.

E-filing originated from complex litigation cases in the 1990s, including asbestos-related and federal court cases. Second Generation Electronic Filings (2GEFS) arose out of Orange County courts in response. As a result of the California budget crisis, the Administrative Office of the Courts saw e-filing as a solution to provide the best public access to the courts at the lowest cost.

While there are some courts that allow a user to electronically file directly with the court, most e-filing is conducted through an approved/authorized, third-party vendor (the Electronic Filing Service Provider, or "EFSP"). On the other end of the e-filing process is the Electronic Filing Manager "EFM" system, which helps the court manager filings from EFSPs. It provides the clerk a review module to accept or reject filings and to communicate with the court's case management system ("CMS").

So, the process looks like this: **You** → **EFSP** → **EFM (Clerk)** → **CMS**

There are several e-filing systems in use, which many of us are familiar with, including True Filing, Odyssey, etc. Additionally, there are 57 EFSPs throughout California available to assist with e-filing.

Some rules to remember about e-filing:

- Font style must be equivalent to Courier, Times New Roman, or Arial (12-point minimum). California Rules of Court 2.104 and 2.105.
- Page numbering must be consecutive, begin with the first page, and use only Arabic numerals. California Rule of Court 2.109.
- Personal identifiers, such as social security numbers and financial account numbers, must be redacted. California Rule of Court 1.201.
- E-filed papers, including exhibits, must be text searchable. California Rule of Court 2.256.
- Exhibits must be electronically bookmarked and indexed. California Rule of Court 3.1110(f).
- Electronic Proof of Service must be included with e-filed documents. Don't forget that proofs of service are signed under penalty of perjury and therefore require an electronic or "wet" signature (not the /s/ signature). The specific format for an electronic proof of service can be found in California Rule of Court 2.251. The rule regarding documents filed electronically that are signed under penalty of perjury can be found at California Rule of Court 2.257(a)(1) and (2).

July Dinner Meeting, cont.

- Paper copies, chambers copies, or courtesy copies may still be requested/required by the court you are e-filing in. For example, San Francisco's Law & Motion Department (Dept. 302) requires that courtesy copies of all e-filed documents be provided. Check the local rules for the county you are e-filing in to see if you must also provide courtesy copies.
- Signatures on e-filed documents must follow the requirements of California Rule of Court 2.257. If allowed by this rule, documents may use an electronic signature or be "signed" and submitted as follows:

Dated: _____

Dewey Cheatham & Howe, LLP

/s/ John Smith

According to California Rule of Court 2.251(a), you can e-serve a document if you can serve it by mail, overnight delivery, or facsimile. Anything that requires personal service is not permitted by e-service. Consent to e-service happens when a party stipulates to e-service or when a party e-files a document with the court. California Rules of Court 2.251(b)1(A) and 2.251(b)1(B). Service is deemed complete at the time of transmission or at the time the notification is sent. California Rule of Court 2.251(h)1. And remember, electronic service adds two court days to any response time for purposes of calendaring.

Frequently Asked Questions regarding e-filing:

Q: What is the typical turnaround time for processing?

A: About 85% of all documents are returned within one business day.

Q: What date will my document be filed?

A: Filing hours vary by court. Documents submitted prior to the court's deadline will be filed that day, except if a document is rejected. Remember, also, that the e-filing vendor (EFSP) may have their own deadline for receipt and processing of documents, so be sure to check with your EFSP on what the deadline is to get your documents to them.

Q: Why would I use a EFSP (vendor) instead of filing directly through the court portal?

A: Each court filing system requires a separate login, credit card, workflow, etc. By using an EFSP, you don't have to worry about managing several accounts. Also, some courts only accept e-filings through an authorized/approved EFSP.

Q: How can I keep track of all the local e-filing rules?

A: Local rules are posted on each court's website; however, your EFSP should be familiar with the rules of each court.

Q: What are the top reasons for documents being rejected in the e-filing process?

A: 1) No fees or incorrect fees; 2) missing or incorrect case information, including hearing date/time or reservation number; 3) document scanned improperly (unreadable, upside down, blank, etc.); 4) document not bookmarked or non-searchable; and 5) Multiple lead documents submitted as one PDF – no combined documents allowed (i.e., Stipulation and Order must be two separate documents; Motion, Memorandum of Points and Authorities, and Declaration cannot all be combined into one document – they must be separate documents).

Thank you to Jim and Larry for taking the time to join us and educating us on California's E-Filing Landscape.

July Dinner Meeting - Photos



Kobi Wear, Jamie Gooch, Sheila D. Brown, Amber Pharr, Kathei Courtland



Drew Davis, Heidi Cornell, Pamela Lee, CCLS



Corene Rodder, Crystal Rivera, Alex Cain



Jim Pinter, Joani Wise



Christina Montoya, Helen Wayne



Michelle Chavez, CCLS, Dawn Willis, Kathei Courtland

July Vendor of the Month

Our July Vendor of the Month was Rosanna Keenan, owner of ASAP Legal Services, LLC. ASAP Legal Services are independent contractors who provide attorneys with cost-effective ways to handle their administrative support and services and are located throughout the United States, Canada, England and Ireland. ASAP Legal Services offers clients strong experience writing and editing legal documents, including state, federal and appellate court briefs, in addition to SEC Filings and USPTO Filings. Areas of law handled by ASAP include complex litigation, product liability, bankruptcy, medical malpractice, and entertainment law, among many others. For more information on ASAP's services, visit their website at <http://www.legalservicesasap.com>. ASAP also has a blog that provides useful information on managing legal practices more effectively and efficiently: <http://www.legalservicesasap.com/blog>.

ASAP

LEGAL SERVICES LLC
30+ YEARS EXPERIENCE



Rosanna Keenan
Virtual Legal/Litigation Assistant

415.531.3710 | asaplegalservices@gmail.com
<http://legalserviceasap.com>



Discover a unique, new way to save time and money. The same support as in-house staff with the flexibility to work off-hours. You pay **ONLY** for the work done, no overhead costs. Easiest way to increase your staff on a small budget and be a leader in the legal community. Proven experience, knowledge, skills, speed.

Call or check our website for more details. **415.531.3710**. <http://legalservicesasap.com>.

If your company is interested in being a Vendor of the Month for SLISA, please contact Jennifer Estabrook, CCLS at jestabrook@somachlaw.com



Kelly Leca and Marci Frazier

Legal Procedures/Court Updates

New Rules of Professional Conduct

The new Rules of Professional Conduct (effective on November 1, 2018) were approved by the Supreme Court on May 10, 2018 by [Supreme Court Administrative Order 2018-05-09](#). The current Rules remain in effect until November 1, 2018.

Each bullet point is a link that will take you to the PDF on the California State Bar's website for that rule.

- [New Rules of Professional Conduct \(download PDF of all Rules\)](#)
- [Rules Cross-Reference Table \(Current Rule to New Rule, New Rule to Current Rule, New Rule to ABA Model Rule\)](#)
- [Client-Lawyer Relationship \(Rules 1.0 - 1.18\)](#)
- [Counselor \(Rules 2.1 - 2.4.1\)](#)
- [Advocate \(Rules 3.1 - 3.10\)](#)
- [Transactions with Persons Other than Clients \(Rules 4.1 - 4.4\)](#)
- [Law Firms and Associations \(Rules 5.1 - 5.6\)](#)
- [Public Service \(Rules 6.1 - 6.5\)](#)
- [Information About Legal Services \(Rules 7.1 - 7.5\)](#)
- [Maintaining the Integrity of the Profession \(Rules 8.1 - 8.5\)](#)

An Important Letter to Congress from the Judges of the Eastern District of California Regarding Our Caseload Crisis

It has been four decades since the last judgeship was created in the Eastern District of California. In that period of time the population of the district has grown 220%. The judges of the Eastern District routinely carry one of the heaviest caseloads in the country. For the last decade the Judicial Conference has recommended adding up to six judges to the Eastern District bench. This continuing crisis, if left unaddressed, will soon result in serious and catastrophic consequences...

[Read the Judges' letter HERE.](#)

Please contact your Senator at the links below and express your concern regarding this crisis.

Contact Dianne Feinstein: <https://www.feinstein.senate.gov/public/index.cfm/e-mail-me?>

Contact Kamala Harris: <https://www.harris.senate.gov/contact/email>

Legal Specialization Sections Lunch & Learn Webinar
Unlawful Detainers

Presented By: Matthew Marino, Esq., Allen Matkins

How many days does the defendant have to answer?
 What if I sub-served the defendant?
 Why do I need to serve a Prejudgment Claim of Right to Possession? How long do I have to respond to discovery in a UD case? How long do I have to file a Default Judgment package?
 Summary Judgment Motions require how many days' notice?
 How do I evict the tenant after a UD judgment?



September 6, 2018, 12-1 pm

ONLINE REGISTRATION AND PAYMENT AVAILABLE AT WWW.LSI.ORG

All Legal Specialization Section Members	LSI / Local Association Member	Non-LSI Member or Attorney
Free with Advanced Registration Registration is \$5 after August 23, 2018	\$10 with Advanced Registration Registration is \$15 after August 23, 2018	\$15 with Advanced Registration Registration is \$20 after August 23, 2018
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

REGISTRATION WILL CLOSE ON AUGUST 30, 2018.

Name: _____ E-mail: _____

Phone: _____ Local LSI Association: _____ (No abbreviations.)

Questions for the Speaker: _____

CLE Certificate Requested: CCLS -- Paralegal -- Attorney [Bar No. _____]
 Payment: Check (made payable to LSI) Credit Card or PayPal Available at www.lsi.org

Send completed form and payment (check made out to LSI) to:
 Renee M. Evans, CCLS, Webinar Section Leader, c/o Dentons US LLP,
 4655 Executive Dr., Suite 700, San Diego, CA 92121; Email: lsiwebinar@lsi.org

The Legal Specialization Sections are a program of Legal Secretaries, Incorporated, an approved provider, and certify that this seminar has been approved for minimum CLE credit of 1 hour by the State Bar of California.



PER LSI STANDING RULES, CHECKS ISSUED TO LSI WHICH ARE NON-NEGOTIABLE BECAUSE OF INSUFFICIENT FUNDS OR OTHER REASON SHALL BE REPLACED IMMEDIATELY BY CASH, A CERTIFIED CHECK OR MONEY ORDER FOR THE AMOUNT OF THE ORIGINAL CHECK, PLUS \$25 PENALTY, PLUS THE ACTUAL COST CHARGED LSI BY THE FINANCIAL INSTITUTION FOR PROCESSING THE ORIGINAL CHECK.



SACRAMENTO COUNTY BAR FOUNDATION

TACO TUESDAY FUNDRAISER!

TUESDAY, AUGUST 14, 2018 - 5:30 PM to 7:30 PM
SCBA Event Center - 425 University Ave., Suite 120



The Foundation is the 501(c)(3) charitable arm of the Sacramento County Bar Association. The Foundation's mission is to support programs that improve the administration of justice, enhance public confidence in the legal profession, and cultivate an understanding of and respect for the rule of law. The Foundation promotes access to justice by providing law student scholarships and grants to Sacramento community organizations including the SCBA Kids Law Day.



\$35 SCBA Members
\$45 Non-SCBA Members
Chicken, Fish or Steak Tacos on Corn or Flour Tortilla, Sides of Spanish Rice, Refried Beans, Cheddar Cheese, Sour Cream and Salsa.

Want to Donate?

YOUR NAME: _____ SCBA MEMBER \$35 NON-SCBA MEMBER \$45

COMPANY NAME: _____

ADDRESS: _____

CITY: _____ STATE: _____ ZIP: _____

EMAIL: _____ DONATE OTHER AMOUNT: \$ _____

CREDIT CARD NUMBER: _____ CHECK NUMBER: _____

EXPIRATION DATE: _____ MASTER CARD VISA CVR CODE NUMBER: _____

Sacramento County Bar Foundation - 501(c)(3) - 425 University Ave. #120 Sacramento, CA. 95825
Phone: (916) 564-3743 Fax: (916) 564-3787 Email: acollazo@sacbar.org

California Certified Legal Secretary

By: Elizabeth Madden, CCLS



Studying for and becoming a CCLS is very empowering. The training and studying can be intense, but only as intense as you want. I am offering to mentor any of you on your journey to become a CCLS. The online course through LSI is now closed for this session, but many of the learning tools are available through the LSI website. Those are items you will need to begin the journey.



Mara Ponce, Elizabeth Madden, CCLS, Rachel Jaimes

I can assist you either one on one, or depending on how many are interested, a small group. If you are interested, please let me know so we can begin the process. Exams are taken in October and March. You can reach me on my cell: 916.847.2953 (if I don't answer, please leave a message) or by email: elizflower@comcast.net. I look forward to hearing from you.

CCLS Quiz

Read each statement carefully and determine whether it is true or false:

1. ____ When using the short form of a case, it is usually done by enclosing the shortened form in parenthesis immediately after the initial cite.
2. ____ When citing California code sections within parenthesis, use code abbreviations followed by a comma and the section symbol.
3. ____ Citations must always be cited in full every time they are cited throughout a document.
4. ____ In citations, abbreviate all states and territories.
5. ____ The signal "cf." is a Latin abbreviation for confer, meaning compare with.
6. ____ The default feature that treats ordinal suffixes as superscripts should not be used except in writing of an informal nature.
7. ____ For amounts under a dollar, always use figures and the cent sign.
8. ____ When addressing a letter, do not abbreviate the city name.
9. ____ The names of well-known government and international agencies are often abbreviated. They are written without periods or spaces.
10. ____ When a measurement consists of several elements, be sure to always use commas to separate the elements.

(1) T (2) T (3) F (4) F (5) F (6) T (7) F (8) T (9) T (10) F



LEGAL SECRETARIES, INCORPORATED
CALIFORNIA CERTIFIED LEGAL SECRETARY

WORKSHOP REGISTRATION FORM

“Legal Computations– Calendaring”

First Quarterly Conference
Stockton Hilton, Stockton, CA

Saturday, August 18, 2018, 7:00-8:00 a.m.

PLEASE NOTE SPECIAL TIME FOR THIS CONFERENCE ONLY

Cost: \$5.00 for LSI members/\$10.00 for non-LSI members

Oh no! My document is due on a holiday – do I roll the due date back to the previous business day or forward to the next business day? How many extra days do you get to respond to discovery that was served via overnight mail? Come learn the intricacies of calendaring in preparation for the CCLS exam.

REGISTRATION DEADLINE: August 14, 2018

Name: _____ Email: _____

Address/City/State: _____

Phone (Work): _____ Local Assn.: _____ LPA/LSA

Please make check payable to LSI. Mail registration to Terrie Quinton, CCLS, c/o Duckor Spradling Metzger & Wynne, 101 W. Broadway, Ste. 1700, San Diego, CA 92101, and email registration to quinton@dsmw.com.

CCLS CREDIT WILL BE GIVEN FOR THIS WORKSHOP



California Certified Legal Secretary
A Program of LSI®



APPLICATION TO TAKE CCLS® EXAM

Mail Application, copy of LSI Membership Card (if applicable), and fees to:
April K. Ignaitis, CCLS, CCLS Certifying Board, P.O. Box 2879, Cupertino, CA 95015

- (Select one) **Northern California** **Saturday, March 16, 2019**
 Southern California **Saturday, September 15, 2018**

- **Deadline:** Applications must be received **60 days** prior to the examination date.
- **Late Application:** Late Fees apply when Applications are received less than **60 days** (but not less than 30 days) prior to the examination date, and accepted only if space is available.
- **Deferral:** Requests to defer to the next exam must be received at least **30 days** prior to the exam date.

EXAMINATION FEES (Select Payment Type)	Check <input type="checkbox"/> Payable to "LSI" Mail to above address	PayPal <input type="checkbox"/> Email exam application to CCLSCertifyingBoard@gmail.com . Payment link will be provided upon confirmation of eligibility to sit for exam.
LSI Members <input type="checkbox"/>	Non-LSI Members <input type="checkbox"/>	
On Time Registration Fee \$ 25.00	On Time Registration Fee \$ 75.00	
Examination Fee* 100.00	Examination Fee* 100.00	
Late Fee (if applicable) 30.00	Late Fee (if applicable) 30.00	
TOTAL DUE w/o Late Fee: \$125.00	TOTAL DUE w/o Late Fee: \$175.00	

Personal Information

Name: _____
 Mailing Address: _____
 Last 4 digits of SSN: _____ Email: _____
 Phone (Day): _____ Phone (Evening): _____
 LSI Member: Yes (enclose copy of LSI Membership Card) No
 Name of Local LSI Association: _____

Employment Information

Provide your legal secretarial employment information beginning with your most recent (or current) employment in order to confirm that you have at least two years' experience. Attach a supplemental page if you have not been in your current position for two years.

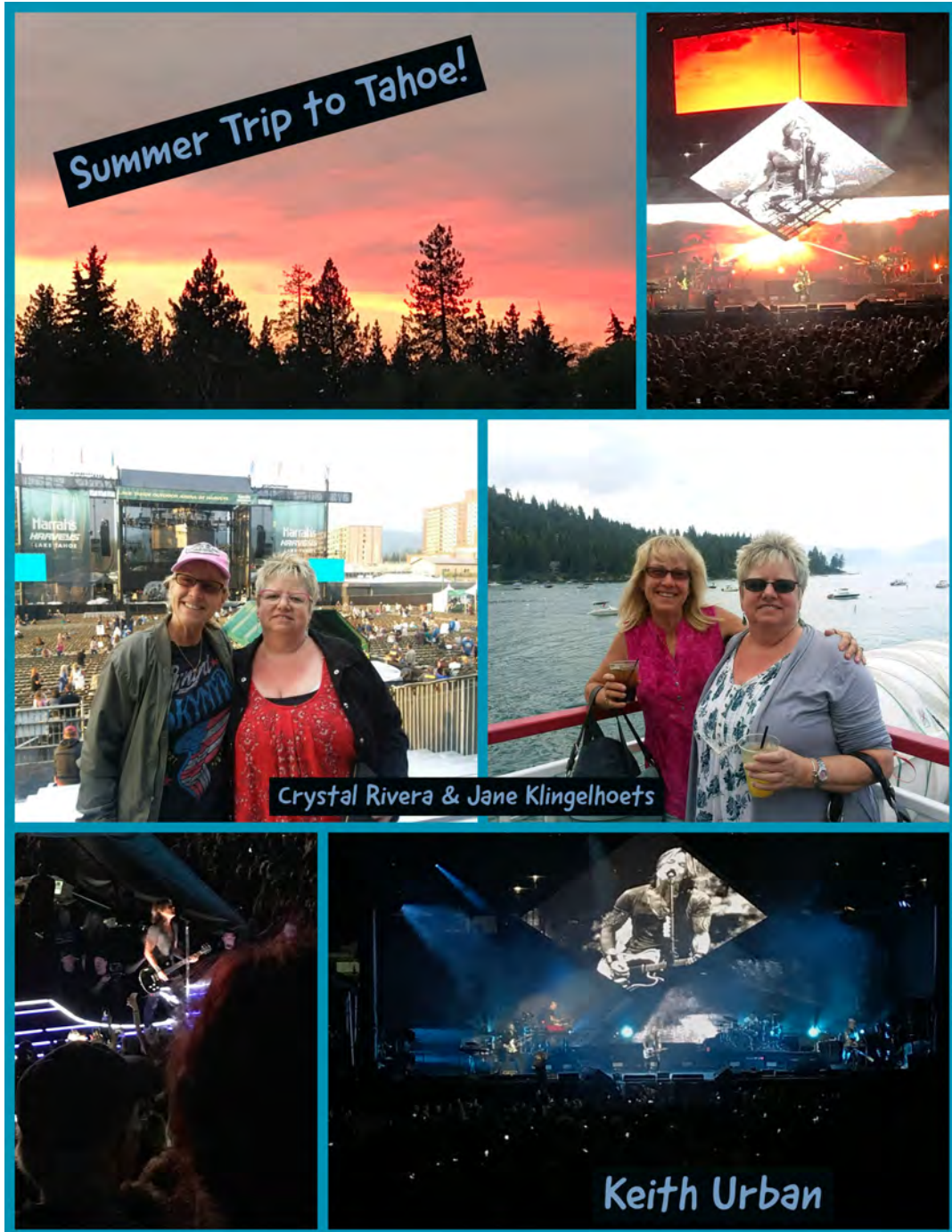
Position: _____ Dates of Employment: _____
 Employer: _____
 (name and address)
 Supervisor: _____ Supervisor's Phone: _____
 Supervisor's Email: _____
 Summary of Duties: _____

I certify that I have completed this application truthfully. I understand that a false statement may result in the rejection of this application or revocation of my certification. I understand and agree that the contents of the examination are confidential and not to be discussed with anyone, and that my employment record will be verified by a member of the California Certified Legal Secretary Certifying Board.

Date: _____ Applicant Signature _____

*Fees subject to change without notice.
Rev. March 2018

What did you do this summer??



Share your summer story pictures!
Email the Bulletin Editor, dawn.forgeur@stoel.com!



SANTA CLARA COUNTY LEGAL PROFESSIONALS ASSOCIATION

A Member of Legal Secretaries, Incorporated® – Educating California’s Legal Professionals

PRESENTS

**Microsoft Office Workshop
Word, Excel and PowerPoint Tips & Tricks**



Santa Clara County Legal Professionals Association invites you to a workshop that aims to provide you with solutions to achieve greater productivity in the workplace. There are always new ways to increase efficiency and knowledge, so look no further than this valuable workshop. We are pleased to have Tom Chandler from Computer Magic Training present tips and tricks for Word, Excel, and PowerPoint, for the beginner, intermediate, and advanced user.

Thursday, August 23, 2018

Presenter: Tom Chandler, Computer Magic Training

Registration: 5:30 p.m.

Dinner: 6:00 p.m.

Workshop: 6:30 p.m. – 8:00 p.m.

Wilson Sonsini Goodrich & Rosati

650 Page Mill Road, Palo Alto, CA 94304

Conference Room – Courtyard 1D (check in at reception desk)

Workshop Fees:	\$65.00	Members (includes dinner/no refunds)
	\$85.00	Non-Members (includes dinner and free one-year membership in SCCoLPA/no refunds)

Register and pay via PayPal at www.sccolpa.org OR contact reservations.sccolpa@gmail.com

This workshop has been approved for 1.5 hours of MCLE/CCLS credit.

SCCoLPA, a local association of Legal Secretaries, Incorporated, an approved provider, certifies that this activity has been approved for minimum continuing education credit by the State Bar of California in the amount of 1.5 hours, of which 0.0 hrs. will apply to law practice management/prevention, detection, and treatment of substance abuse and emotional distress and 0.0 hrs. in elimination of bias credit (as appropriate to the content of the activity).

LEGAL SECRETARIES INCORPORATED (LSI) - BENEFITS

Note: This list is maintained for use by members of Legal Secretaries, Inc. Agents for insurance and financial providers are available as resources when members inquire about benefits. Please use this as a starting point; ask for information, compare policy coverage and prices. LSI wants its members to find the BEST coverage for each member's individual needs and location. For information, call these representatives directly.

<p>*NEW BENEFIT: LEGALSHIELD/IDSHIELD Contact: Courtney Coats, Independent Associate (925) 580-6446; coats8@legalshieldassociate.com LegalShield offers legal, identity theft protection, along with a massive Perks Program where you will have significant savings to over 500 local and national companies.</p>	<p>QUESTIONS AND CONCERNS CONTACT: Heather Edwards, LSI Vice President LSI Marketing Committee Coordinator (818) 482-7040 heatheredwardslsi@aol.com</p>
<p>WORKING ADVANTAGE Toll Free: (800) 565-3712 www.workingadvantage.com Discount on event tickets, movie tickets, theme parks, Broadway theater, sporting events, ski tickets, hotel certificates, family events, gift cards and more. Member ID: Contact LSI Corporate Office, info@lsi.org, or LSI Vice President</p>	<p>HERTZ CORPORATION Effective Date: June 1, 1996 CDP Card #447698 (800) 654-3131 www.hertz.com</p>
<p>FINANCIAL PROVIDERS</p>	
<p>CAPITAL INVESTMENT ADVISERS Emerson J. Fersch, CFP, ChFC, CLU, CASL 5000 E. Spring Street, Suite 200 Long Beach, CA 90815 Office: (562) 420-9009 or (877) 270-9342 Fax: (562) 420-9955 www.ciadvisers.com Offering Retirement Planning/Investment Management, Pension and 401K Rollover Consulting, and Comprehensive Financial Planning</p>	<p>LEGACY WEALTH MANAGEMENT Daniel R. Henderson, MBA, CFP 3478 Buskirk Avenue, Suite 300 Pleasant Hill, CA 94523 Office: (925) 296-2853 or (877) 679-9784 Fax: (925) 944-5675 E-mail: daniel@legacywealthmanagement.biz www.legacywealthmanagement.biz Offering discounted John Hancock Long Term Care Insurance & Life Insurance, Annuities, Retirement, Investment & Estate Planning, Mutual Funds, & 401K</p>
<p>DAVID WHITE & ASSOCIATES Wealth Accumulation and Preservation 3150 Crow Canyon Place, Suite 2000 San Ramon, CA 94583 (800) 548-2671 Contact: Ryan Gonzales (ext. 2682), rgonzales@dwassociates.com, or Matt Kay (ext. 2628), mkay@dwassociates.com Offering Investments, Retirement Plans, Education Savings Accounts, Medical Insurance, Life Insurance, Disability Insurance, and Long Term Care Insurance</p>	<p>ATHLETES BUSINESS CONSULTANTS Jory Wolf, President/Founder 350 10TH Avenue, Suite 1000 San Diego, CA 92101 Office: (858)886-9842 Cell: (510)919-9062 jorv@athletesbiz.com California Insurance License: 0E88330 10% discount on Long Term Care, call for information on life, long term, and disability insurance, as well as commercial and residential lending</p>
<p>CREDIT UNIONS</p>	
<p>LA FINANCIAL FEDERAL CREDIT UNION P.O. Box 6015 Pasadena, CA 91102-6015 (800) 894-1200 www.lafinancial.org Open to anyone living, working or worshipping in Los Angeles County, or referral from existing member.</p>	<p>PROVIDENT CREDIT UNION 303 Twin Dolphin Drive P.O. Box 8007 Redwood City, CA 94603-0907 (800) 632-4699 - (650) 508-0300 www.providentcu.org All LSI members are eligible to join.</p>

Revised 03/2017

2018-2019 Committee Members

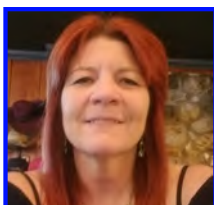
Advertising Crystal Rivera	Legal Secretarial Training Astrid Furstner, CCLS, OCP Dawn Forgeur, CCLS
Audit (Financial Review) Kim Bogie, Gisele Mitsuk, Open	LSI Annual Conference 2020 Crystal Rivera Corene Rodder
Benefits Mary Taylor	Marketing & Membership Crystal Rivera
Budget Committee Crystal Rivera, Open (2)	Nominations & Elections Crystal Rivera, Dawn Forgeur, CCLS, Open
Bulletin Editor Dawn Forgeur, CCLS	Professional Liaison Dawn Willis
Bulletin Proofing Christie Kaelber, Jessica Patton, Shannon Kline	Programs - Dinner & Lunch Lynne Prescott, CCLS
California Certified Legal Secretary Elizabeth Madden, CCLS	Publicity Terry Olson
Charitable Projects Gisele Mitsuk	Reservations & Reception Corene Rodder
Day in Court Jessica Patton (Chair), Amber Pharr, Open	Scholarship Crystal Rivera, Lynne Prescott, CCLS
Employment Jaymie Morales	Vendor Liaison Jennifer Estabrook, CCLS
Historian - Open	Ways & Means - Open
Interclub - Open	Website / Social Media Deseree Aguillen
Law Office Products & Management Gisele Mitsuk	Fairytale Town Deseree Aguillen, Christina Witt
Legal Procedures - Open	Reno Bus Trip Crystal Rivera, Corene Rodder
Legal Professional of the Year/Boss of the Year Elizabeth Madden, CCLS Michelle Chavez, CCLS	

2018-2019 Executive Board



Brenda Bracy, CCLS
President

Brenda is a legal secretary with Boutin Jones Inc. in their Litigation Department. She has been a member of SLSA since 2014, and was Vice President from 2016-2017 and Secretary from 2015-2016. She has been in the legal field for 30+ years.
president@slsa.org



Kelly Leca
Secretary

Kelly is the Administrative Assistant at Messing Adam & Jasmine LLP. Kelly has been a member of SLSA since 2016. She has been in the legal field for 7 years.
secretary@slsa.org



Marci Frazier
Treasurer

Marci is a civil and bankruptcy litigation secretary at Downey Brand LLP. She has been in the legal field for 30+ years and has held several positions including paralegal, office manager, and legal secretary.
treasurer@slsa.org



Jan Ainsworth
Governor

Jan is a litigation secretary and docket clerk for Murphy Austin. She has been in the legal field for 30+ years and was awarded Lifetime membership in SLSA. She has served SLSA in many capacities over the years, including President (2002-2004).
governor@slsa.org



Crystal Rivera
Executive Advisor

Crystal is a legal secretary at Somach Simmons & Dunn, an environmental law firm. She has been a legal secretary since 1979. She has served SLSA in many capacities over the years, including President (2015-2017).
executiveadvisor@slsa.org



Astrid Furstner, CCLS, OCP, CORE Registered Paralegal Parliamentarian

Astrid has been a paralegal for 15+ years, with a specialization in environmental law and litigation. She was awarded Lifetime membership in SLSA. She has served SLSA in many capacities over the years, including President (2005-2007, 2010-2011).
parliamentarian@slsa.org



CAPITOL DIGITAL

Free Pickup & Delivery in the Greater Sacramento Area

Available 24 hours a day — Seven days a week!

No Rush Fees

(916) 449-2820

Electronic Discovery

Web Hosting

Litigation Copying

Litigation Scanning

Bates Numbering

On-Site Copying & Scanning

Coding

Banner and Court Exhibit Boards

Labeling

Oversized Copying, Scanning & Printing

Binding

Color Copying, Scanning & Printing

High Volume Copying

Video & Audio Duplication

X-Ray Duplication & Scanning

File Conversion



555 Capitol Mall, Suite 235 • Sacramento, CA 95814 • (916) 449-2820
www.Capitol-Digital.com