

# The Legal Eagle

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





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Photo credit: Dawn Forgeur, CCLS

## Current and Upcoming Events

- |  |   |  |  |
|--|---|--|--|
|  Feb 12 | SLSA Board Meeting                        |  Feb 21 | Annual Federal Court Updates Dinner<br>Hilton Arden West, Sacramento |
|  Feb 15 | LSI Quarterly Conference<br>San Diego, CA |  Mar 12 | SLSA Board Meeting   |
|  Feb 18 | President's Birthday                      |  Mar 21 | SLSA Dinner Meeting  |

## REACH RECORD HEIGHTS

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# President's Message

By: Brenda Bracy, CCLS

As my second year as President ends, I want to thank you for re-electing me as your President. I have had a great year getting to know all of the awesome people in this organization, members of other associations, members of LSI, and several vendors. I have enjoyed attending various events with other members throughout this last year. We put on some tremendous charitable events, and have had some outstanding speakers at our monthly dinner meetings. I have attended several LSI conferences this past year, and also attended some great classes. I encourage all of you to attend at least one LSI class this year. You will not regret it. You do not have to attend the whole conference in order to attend the classes. I always leave the conferences with a wealth of information and learn something new.

Elections for board members are coming up this month. I have enjoyed being on the Board of this organization for the past five years, and President for the past two. It has been a pleasure working alongside the fantastic people in this organization. I look forward to seeing some new faces this year. If you are interested in becoming a board member or committee member, please let me know.

Last month was our State Day in Court event. We had a fabulous turnout and the court executives did an outstanding job. I want to thank Jessica Patton and Terry Olson who did an excellent job as the Chair and Co-Chair for this event. I always enjoy attending the Day in Court events, seeing old faces and getting to catch up with everyone. It is also a perfect time to visit with the vendors. They really go all out for this event, and it makes this event so special. I hope everyone that attended had a chance to visit with each of the vendors.

Our Federal Day in Court event is coming up on February 21, 2019. This will also be our nominations night. Our speakers include the Honorable Morrison C. England, Jr., Career Law Clerk, Wim van Rooyen, and Bankruptcy Clerk, Cathy Waltz. Please sign up soon as the last day to register without a late fee is February 15, 2019.

I want to remind you that our parent corporation, LSI, is a great source for continuing education, along with SLSA. LSI offers a variety of educational opportunities for all of its members. The schedule of classes, webinars, and conferences are listed on the website at [www.LSI.org](http://www.LSI.org). If you attend a seminar, class, or conference, please send our Governor, Jan Ainsworth, an email that you attended, or go to our website, [www.SLSA.org](http://www.SLSA.org) and fill out the [CAPs form](#).

I look forward to seeing everyone at SLSA events and meetings. Please feel free to contact me if you have any questions, suggestions, or comments at [president@slsa.org](mailto:president@slsa.org).



## SLSA 8-gig USB Drive Available for Purchase

\$10.00 cash/check discount

\$10.61 credit card

Email [executiveadvisor@slsa.org](mailto:executiveadvisor@slsa.org)  
if you would like to purchase one.



Sacramento Legal Secretaries Association Proudly Presents  
**Annual Federal Court Updates Dinner**

Exhibitors, and Speakers from the U.S. District Court, Eastern District and Bankruptcy Court

Hilton Arden West, 2200 Harvard Street, Sacramento

**February 21, 2019**

Exhibit Gallery & No Host Bar: 4:45 p.m. Dinner: 6:15 p.m.

DEADLINE TO REGISTER: February 15, 2019. Add \$5 after Deadline



SLSA Members: \$45  
Non-members: \$50

**TWO WAYS TO REGISTER:**

- Online at [www.slsa.org](http://www.slsa.org) under upcoming events. (Preferred.)
- Via email at [reservations@slsa.org](mailto:reservations@slsa.org). Please include menu choice.

Make checks payable to:  
Sacramento Legal Secretaries Association  
& mail to:  
Corene Rodder  
% Somach Simmons & Dunn  
500 Capitol Mall, Suite 1000  
Sacramento, CA 95814

Cancellations must be made 72 hours in advance for a refund. No-shows will be billed!

**Menu Options:**

- Grilled New York steak topped with mushrooms and cabernet demi, potato gratin, fresh vegetable du jour.
- Salmon fillet with mango salsa and teriyaki glaze, jasmine rice, fresh vegetable du jour.
- Vegetable Wellington, medley of grilled California vegetables, mozzarella fresh herbs, wrapped in puff pastry, marinara sauce and pesto.

Questions? Contact Jessica Patton  
E: [jessicap@sdlaw.com](mailto:jessicap@sdlaw.com)  
T: (916) 448-7888

# Governor's Report

By: Jan Ainsworth

Can you believe it is already February? Wow. Time does fly. I hope you do not forget your sweethearts on Valentine's Day. As for me – I will be baking my gifts.

Once again, this is yet another report that I will keep brief.

LSI's Third Quarterly Conference will be held February 16-17, 2019, at the Viejas Hotel and Resort in Alpine, CA; Host Assn: San Diego County LSA. I will be in attendance along with several other SLSA members and will report at length next month so stay tuned.

CHAPTER ACHIEVEMENT POINTS TO DATE: 21,900

In addition to earning CAPs, it is again time to begin tallying points earned for this year's Chapter Achievement Contest. **The deadline to report to me is March 15** so I may compile and ensure timely contest submittal by March 26. This especially applies to all you CCLSEs out there. If you have recertified please let me know. Also, if you have received updates to your Law Office Procedures Manual or your Legal Professional's Handbook, let me know! We won last year so let's take home the coveted prize again this fiscal year! Thanks all.

## CALL FOR NOMINATIONS

Simply put - SLSA needs volunteers.

SLSA Executive Board members are legal professionals who are committed to helping others and the legal community. This association needs new people who are willing to give some of their time back to SLSA. Currently, there are a few volunteers doing several jobs that should be spread out amongst the members. When those few volunteers just can't do more, SLSA will not be able to provide a monthly bulletin, monthly dinner meetings, connect with the vendors, represent the members at the state level, and participate in the charitable projects that benefit our community.

Get out of your comfort zone, become more involved in the association. You can do it and the time is now!

We are also accepting nominations for delegate positions for the May Annual Conference. Annual Conference is May 15-19, 2019, at the Double Tree by Hilton in Newark. As a delegate, you will attend this one conference and represent SLSA's members at the business meetings. Delegates also attend educational workshops and Saturday night banquet – it is an awesome way to learn about LSI, attend educational classes, meet and network with other legal professionals from around the state, and also earn SLSA Chapter Achievement Points!

The deadline to submit nominations is on or before February 21, 2019, which is our Annual Federal Court Updates Meeting. Please email [executiveadvisor@slsa.org](mailto:executiveadvisor@slsa.org) with any nominations or questions.

# 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](mailto:jainsworth@murphyaustin.com) OR [governor@slsa.org](mailto:governor@slsa.org))

# Upcoming Conferences



February 2019 Quarterly Conference  
Viejas Casino & Resort Hotel, Alpine, CA  
[Opposite the Viejas Factory Outlet Mall]  
Dates: February 15-17, 2019  
Scrip - \$150 / Room - \$149  
Host Assn: San Diego County LSA

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

August 2019 Quarterly Conference  
Hilton Los Angeles North/Glendale, Glendale, CA  
[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, CA  
[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, CA  
Dates: February 21-23, 2020  
Scrip - TBA / Room - TBA  
Host Assn: Stanislaus County LPA

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

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

## EDITOR'S NOTE

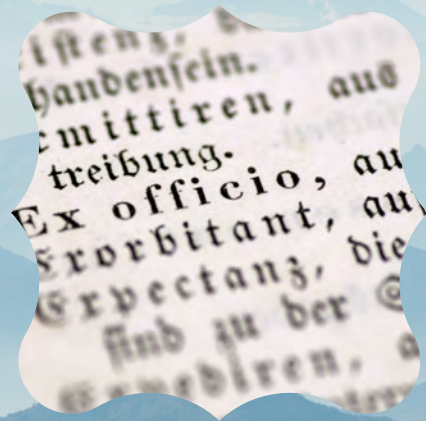
The Legal Eagle welcomes letters to the editor, questions, and articles from readers. Please send them to [editor@slsa.org](mailto:editor@slsa.org). SLSA reserves the right to edit articles and letters sent in for publication. The deadline for all submissions is the Monday after the dinner meeting.

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.

# Parliamentarian's Corner

By: Astrid Furstner, CCLS, OCP, CRP

Ex Officio – what does it mean? According to our Bylaws, the President shall be an ex officio member of all committees except the Nominations and Elections committee. According to Robert's Rules of order, Ex officio is defined as "by virtue of office." Being an ex officio means that the President is a member of all committees except that of the Nominations and Elections committee. The President may attend and be a part of any of the committees. If a certain committee is required to have quorum within its own group, the President would not be counted towards the quorum, but may attend the meeting and still have a right to discuss motions and participate. It is generally known that all chairmen must report to the President. This helps the President keep track of what the association's committees are doing, how to track the progress, and generally be aware of what is going on within SLSA. Our own Bylaws specifically state that no chair shall take final action until a report has been made to the President. That also applies to signing contracts on behalf of our association. This association is run by volunteers, but ultimately, it is up to the President to make sure that things are being run well and stays on track. Sometimes, it can be a daunting task, but with a great team and a lot of support, anything is possible.



## ANNOUNCEMENT Increase in Dues

Please be advised that our membership dues will increase effective the new fiscal year (May 1, 2019). Per LSI's updated rules, per capita tax has been increased to \$30 for Active Members and \$15 for Student/Associate Members. SLSA has not increased its own dues.

New dues effective May 1:

\$50	Active Members
\$25	Student/Associate Members of SLSA only
\$40	Student/Associate Members of SLSA and LSI

Updated application and renewal forms will be posted to SLSA's website in April. Thank you.



# Member News

By: Jaime Gooch

Welcome and congratulations to the following new members of SLSA.

## ACTIVE MEMBERSHIP

**Kristin Taylor-Karrer.** Kristin is a Junior Paralegal/Legal Receptionist for Churchwell White and has been a legal professional for two years. She celebrates her birthday on September 15.

**Charlie Delos Santos.** Charlie is currently a Docket Clerk for Greenberg Traurig, specializing in Litigation. He has been a legal professional in various capacities for 16 years and celebrates his birthday on May 3.

**Kelley Anderson-Atkins.** Kelley is a Legal Assistant for the Arnold Law Firm. She specializes in Family Law, Law Office Management, Litigation, and Probate/Estate Planning. She has been a legal professional for 12 years. She enjoys puzzles, baseball, and crafts. She celebrates her birthday on June 22.



Charlie Delos Santos, Jaime Gooch

# Happy February Birthdays!

- Christina Montoya - February 1
- Maggie Foley - February 6
- Crystal Roberts - February 16
- Rhonda Ladrado - February 18
- Tammy Hunt, CCLS - February 20
- Jenny Beck - February 22
- Tammara Cheung - February 25
- Cyrene Farrell - February 27



## Condolences

Debbie Frias, long-time SLSA member, past President, and former LSI Treasurer, has passed away. Cards of condolence may be sent to Debbie's family at the following address:

Bill Frias  
4214 Oberon Avenue  
North Highlands, CA 95660



The father of Mary Taylor, SLSA member, has passed away. Cards of condolence may be sent to Mary at the following address:

3301 N. Park Drive, #21  
Sacramento, CA 95835.

Birdie Flores, San Gabriel Valley LSA Past President 1999-2000, has passed away. Cards of condolence may be sent to her son at the following address:

Michael Williams  
630 W. Live Oak  
San Gabriel, CA 91776

# Annual State Day in Court

## By: Jessica Patton, Day in Court Chair

On January 17, 2019, the Sacramento Legal Secretaries Association held its Annual State Court Updates dinner meeting (Day in Court) at the Hilton Arden West, in Sacramento, California.

The evening started with a no-host bar and an exhibitor gallery. Our local vendors support our organization and they made this year's event another success. Attendees had the opportunity to connect with local vendors and grab some swag like umbrellas, salad shakers, mugs, calendar wheels, etc.



Lisa Hancock, Catherine Hohenwarterf, Jessica Patton, Jennifer Tisdale, Brandi Burke, Christa Beebout, Linda Gutierrez, Shane Simpson, Darlene Warnock, Terry Olson

Spinelli Donald & Nott's, Jessica Patton, was the Chair of the event this year. Jessica has been with Spinelli Donald & Nott for almost 7 years. She started as a Receptionist for the firm, then took SLSA's Basic Legal Secretary course in 2012, and was then promoted to secretary. Today, she works for the managing partner and senior associate of the firm. Jessica was Co-Chair of the State and Federal Days in Court for 2016 and 2017.

As usual, the food and dessert were impressive and a great way to get the meeting started. Speakers from Sacramento Superior, Placer Superior, Yolo Superior, and the Third District Court of Appeal joined us this year to educate the Association on local rule changes, as well as give us tips, tricks and pet peeves for each court.

### ***Sacramento Superior Court***

Christa Beebout, Judicial Assignment Manager, Shana Simpson, Civil Operations Manager; and Linda Gutierrez, Supervisor were speakers on behalf of Sacramento Superior.

Changes to Local Rules 1.12, 2.31, 2.35, 2.49, 2.55, 2.99.04, 7.08, 7.18, 7.31, 7.37, 7.41, 7.42 were reviewed. Sacramento still has a live update email blast that is now being run by Kelly Sullivan, Director of Operations of Criminal and Civil. To be added to this email chain, please provide your contact information to Jessica Patton ([jessicap@sdnlaw.com](mailto:jessicap@sdnlaw.com)).

Local Rule 1.12(c) was revised, and the services of official court reporters are no longer available for unlawful detainer hearings at the Carol Miller Justice Center.

### ***Placer Superior Court***

Jennifer Tisdale, Operations Director and Brandi Burke, Civil Manager spoke on behalf of Placer Superior Court. With the opening of Department 20 in Roseville, Department 13 located in Auburn is now closed permanently.

Local Rule 20.1.7 states that if you have a conflict with a future hearing date set in the CMC calendar notes, or oppose the future dates set in the Case Management Conference, the attorney/party must appear at the CMC in person. That attorney/party must provide at least 7 days' notice to all other parties in the case of their intent to appear at the CMC.

Revisions were also made to Local Rules 10.4, 10.8, 10.15, 10.24, 20.1.7, 30.1, 30.2, 60.1, 80.1.5 and 80.1.6. Placer is no longer providing court reporters for civil trials and family law matters; with the exception of contempt matters and contested long cause evidentiary hearings and trials, all hearings regarding probate, civil harassment restraining orders, unlawful detainers, name changes and other civil petitions and all infraction hearings and non-evidentiary misdemeanors.

# Annual State Day in Court, cont.

## Yolo Superior Court

Lisa Hancock, Assistant Operations Manager and Catherine Hohenwarterf, Family Court Manager and Family Law Facilitator appeared on behalf of Yolo Superior.

Yolo had no revisions to their Local Rules for 2019. Telephone and counter hours for Civil, Criminal, Juvenile, Probate, Small Claims, and Traffic are 8:00 a.m. to 4:00 p.m.

## Third District Court of Appeal

Darlene Warnock, Supervising Deputy Clerk was present on behalf of the Third District Court of Appeal. SLSA would like to congratulate Darlene on her retirement this summer.

Did you know pursuant to Local Rule 5(e)(7) all documents shall not have color covers, color signatures, or other color components absent leave of court? The crowd went wild at the event when they heard this one!

To end the evening, Terry Olson, DIC Co-Chair announced the vendor prizes. We really do have the best vendors here in Sacramento! Attendees won raffle prizes such as a Kindle Fire tablet, Kate Spade Lunch Bag, Visa gift card, Target gift card, and the list goes on!



Jessica Patton, Rebecca Lerma, Maryanna Rickner, Deseree Aguillen, Corene Rodder, Anne French, Dawn Forgeur, CCLS, Marci Frazier, Josie Garcia, Crystal Rivera, and Brenda Bracy, CCLS

Overall, the event was a success! Not only are the Day in Court events a great tool to learn tips and tricks of the local courts and educate yourself on the revised local rules, these events are a great networking tool. Guests had the opportunity to meet the SLSA Board, court clerks, and connect with vendors in the industry. Thanks to those who came out to the event in January and we encourage anyone who could not make it to join us next year.

A special thank you to Terry Olson, DIC Co-Chair, for her countless hours in making this event and the exhibit gallery such a success. Thank you to our registration team as well.

If you would like to volunteer to help at our next event, please contact Brenda Bracy at [president@slsa.org](mailto:president@slsa.org).

*thank you*

## Exhibitors

Veritext  
U.S. Legal Support  
Capitol Digital and Calforensics  
Compex  
Atkinson-Baker  
Aptus  
Sacramento Placement Services

Capitol Legal Investigations  
First Legal  
Sacramento Legal Video Center  
Macro-Pro  
Nationwide  
Pampered Chef  
95814 Digital

# Annual State Day in Court, cont.



Corene Rodder and Jan Ainsworth



Sacramento County Superior Court



Placer County Superior Court



Brenda Bracy, CCLS and Jessica Patton



Yolo County Superior Court



Terry Olson and Jessica Patton



Third District Court of Appeal



Atkinson Baker



Pampered Chef



Sacramento Legal Video Center



Banquet Room



Nationwide



U.S. Legal



Veritext



Aptus

# Law Office Products and Management

## Emerging Tech Trends to Enhance Your Legal Practice in 2019

By: Erika Winston

<https://www.timesolv.com/emerging-tech-trends-to-enhance-your-legal-practice-in-2019/>

With the emergence of 2019 comes a host of new and upgraded tech trends that can add substantial value to your law firm. Tech firms across the country are releasing their lists of top tech trends for 2019. Below, we will go through some these trends and examine how they can help lawyers say goodbye to 2018 and hello to an innovative, more secure, and profitable new year.

### Increased Cybersecurity

As cyber attackers continuously come up with ways to steal your law firm data, security experts are busy trying to identify these threats and create strategies to fight against them. An ABA study reported that 44% of US law firms experienced a security threat and breach in 2017. If you do not want to be counted in that statistic for 2019, you have to embrace and implement new cybersecurity technologies.

Experts say that there are hundreds, if not thousands, of new threats detected every single day. To deal with these threats, legal cybersecurity companies are strengthening their protection technologies. With an emphasis on integration, automation, and real-time detection, improved and developing cybersecurity measures are unquestionably on trend for 2019.

### Legal Research Technology

Artificial Intelligence (AI) innovations are changing the way that lawyers and legal professionals handle the time-consuming task of legal research. These new technologies use natural language processing to quickly and efficiently sort through cases and statutes, finding those that are relevant to your subject matter.

With these new innovations, you only have to upload a brief or pleading into the database to find and access cases, summaries, and legal analysis. There is even AI software on the market that does the work of Shepardsizes cases for you.

Like most AI technologies, these platforms can save you an extensive amount of time and provide you with increased confidence in your research. With a mobile legal research software, you can double check the accuracy and currency of your research right before, and even during, the litigation process.

### Case Outcome Predictions

AI is also expected to have an impact in the area of outcome predictions. Using data and algorithms, AI systems have the ability to predict the outcome of legal cases. In some cases, these AI predictions have been proven even more accurate than human predictions. Researchers and inventors are hopeful that these innovations will open the door to greater analytical analysis within the legal community, helping lawyers to increase their success rates and provide clients with more accurate expectations about their cases.

### Document Automation

A good deal of legal practice time involves the creation of documents. From pleadings and to contracts, to settlement agreements, lawyers are constantly working to draft and perfect documents. Document automation software uses the latest technology to draft documents more quickly and accurately than can be done manually.

Once data is uploaded into the software, the system automates the drafting process. The program can include an entire suite of related documents from the input of one data set. It can even identify the need for inclusion of certain clauses. All of the inputted data can then be reused to save you and your firm staff valuable time.

# Law Office Products and Management, cont.

## Emerging Tech Trends to Enhance Your Legal Practice in 2019, cont.

This new and innovative type of workflow can free you to handle more profitable matters and reduce your costs for service delivery – leading to greater profitability.

### Visual analytics

Visual analytics is defined as the application of “analysis and reasoning to information sets using some sort of visual means. It combines the best of a person’s capabilities (decision making, analysis, and reasoning) with the number crunching capabilities of a computer... through a visual interface.”

This is the latest tool to innovate the often overly-cumbersome and time-consuming process of document review. Recognizing the need for quick access to key case information, tech companies are developing software that uses visual analytics to assist lawyers in efficiently building cases from the very beginning and reducing document review costs.

### Information Governance

As risk mitigation becomes more crucial within the legal industry, law firms are having to find more secure methods of handling their records management. Large corporations are routinely implementing stricter information governance (IG) policies, and law firms are being forced to comply or lose profitable clients.

Many legal practices are ill-prepared to handle these requirements, particularly due to the challenge of managing paper and electronic files. Electronic data may be stored on numerous platforms, while paper data may be located at on-site and off-site locations. Innovative IG software platforms are helping law firms manage all of their records in a concise and efficient manner, no matter their storage location.

These technologies are automated and produce audit trails for paper, electronic, and transactional records for easy reporting and compliance auditing.

### LPM Software

The use of legal project management will continue to spread throughout the legal profession in 2019, so lawyers will increasingly need innovative LPM technologies to successfully implement their projects. Innovative platforms, like TimeSolv, provide attorneys with the tools to manage projects and each of the included tasks.

Time Solv’s legal billing system includes LPM capabilities that allow law firms to streamline their processes, and review matters for profitability and efficiency before and during the case. With the ability to divide projects into small tasks, and extensive oversight procedures, attorneys can better utilize their time and resources toward greater profitability.

### Embrace tech trends in the coming year

Believe it or not... 2018 is almost over. It’s time to take a good look at the technical capabilities of your law firm and consider implementing new technologies that will allow your law office staff to work smarter and not harder. Take this new year as an opportunity to embrace new tech trends and up your practice game.

About Erika Winston:

Erika Winston is a freelance writer with a passion for law. Through her business, The Legal Writing Studio, she helps legal professionals deliver effective written messages. Erika is a regular contributor to TimeSolv and a variety of other publications.

[www.legalwritingstudio.com](http://www.legalwritingstudio.com)

# California Certified Legal Secretary

By: Elizabeth Madden, CCLS

## Match the document with the due date.

- |   |    |  |
|---|----|--|
| _____ Overnight mail extension of time  | A. | 3 court days before the hearing                      |
| _____ Notice of motion and motion       | B. | 5 calendar days                                      |
| _____ Case Management Conference        | C. | 16 court days before the hearing                     |
| _____ statement                         | D. | 2 court days   |
| _____ Notice of Telephonic Appearance   | E. | 5 court days before the hearing                      |
| _____ Responses to written discovery    | F. | 15 calendar days before the conference               |
| _____ Reply to motion                   | G. | 30 calendar days after service                       |
| _____ Request for entry of default      | H. | 9 court days before the hearing                      |
| _____ Notice of ex parte application    | I. | 10 calendar days after response to complaint was due |
| _____ Service by mail extension of time | J. | 10:00 a.m. the court day preceding the hearing       |
| _____ Opposition to motion              |    |  |

## Unlawful Detainer Vocabulary

### Answer

To respond to a pleading or discovery request; a defendant's first pleading that addresses the merits of the case.

### Complaint

The initial pleading that starts a civil action and states the basis for the court's jurisdiction, the basis for the plaintiff's claim, and the demand for relief.

### Default

The omission or failure to perform a legal or contractual duty.

### Defendant

A person sued in a legal proceeding.

### Demand

To claim as one's due; to require; to seek relief.

### Eviction

The act or process of legally dispossessing a person of land or rental property.

### Judgment

A court's final determination of the right and obligations of the parties in a case.

### Notice

Legal notification required by law or agreement.

### Plaintiff

The party who brings a civil suit in a court of law.

### Serve

To make legal delivery of (a notice or process).

### Unlawful Detainer

The unjustifiable retention of the possession of real property by one whose original entry was lawful, as when a tenant holds over after lease termination despite the landlord's demand for possession.

### Writ

A court's written order, in the name of a state or other competent legal authority, commanding the addressee to do or refrain from doing some specified act.

# Legal Procedures / Court Updates

By: Dawn R. Forgeur, CCLS

As always, the beginning of the year brings changes to the laws. Listed below are links to the various changes to the California Rules of Court and the Judicial Council of California's new and revised forms. Please look them over as there seems to be something for every legal specialization.

## California Rules of Court - New and Amended Rules

- [Adopted September 21, 2018 - Amendments effective January 1, 2019](#)
- [Adopted November 30, 2018 - Amendments effective January 1, 2019](#)
- [Adopted January 15, 2019 - Amendments effected January 22, 2019](#)

## Judicial Council Forms - New and Revised Forms

- [Approved September 21, 2018 - effective January 1, 2019](#)
- [Approved November 30, 2018 - effective January 1, 2019](#)
- [Effective January 22, 2019](#)

One change I would like to highlight is a change in requirements for signatures on documents signed under penalty of perjury, [California Rules of Court, rule 2.257\(b\)](#). (See graphic to the right.)

I read this to mean that if I am filing a declaration in an e-filing court (such as Los Angeles Superior or San Francisco Superior), the declaration would need to be changed from:

### ~~(a)~~(b) Documents signed under penalty of perjury

When a document to be filed electronically provides for a signature under penalty of perjury of any person, the document is deemed to have been signed by that person if filed electronically provided that either of the following conditions is satisfied:

- (1) The declarant has signed the document using an electronic signature a computer or other technology, in accordance with procedures, standards, and guidelines established by the Judicial Council and declares under penalty of perjury under the laws of the state of California that the information submitted is true and correct; or

*"I certify (or declare) under penalty of perjury that the foregoing is true and correct."*

to the new wording:

*"I certify (or declare) under penalty of perjury under the laws of the state of California that the information submitted is true and correct."*

**As always, please check with your attorney(s) regarding this rule to confirm.**



# Tips For Working with a Runner

By: Alexander Cain

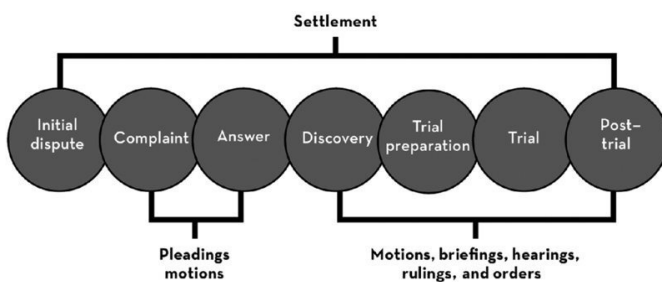
Depending on your particular role as a legal professional, you may end up relying on a legal support company (runner or process server) quite heavily to accomplish your critical assignments outside of the law firm. This can include court filings, service of process, legal research, document review, or even general deliveries. This being so, building a strong working relationship with your runner can greatly increase your workflow and hopefully alleviate a little stress.

There are several points of focus to look at that can be beneficial when sending work to your runner or process server, and may greatly help with completing outside assignments in a timely manner. We'll go over a few of those points for your court filings and service of process briefly below.

For court filings, the first step for successful completion is to first coordinate with your runner once you begin drafting your documents to be filed with the court (or catch wind of a project in the works). The early "heads up" will provide you with any concerns on behalf of the runner, which may include updated deadlines, court closures or local procedural requirements, or even if a court has recently converted to e-filing. It is often best not to discover issues once your project is ready to be sent to a court.



For example, one court can require additional local documents to be provided on a particular filing when another court might not.



Your runner is most likely immersed in court filings and has a good knowledge of local rules and procedures, so always feel free to ask them if you are unsure about a particular item in question. They might also suggest a more fluid method to accomplishing a difficult task.

Once a filing is coordinated and finally sent to your runner, make sure they confirm receipt of that assignment. Even with the most trusted support and reliability of electronic transmissions, emails are not fail-safe as outages can and do happen. Your runner can then proceed with any document review if requested (depending on the runner and services offered) and then format and prepare your documents to be filed with the court depending on that court's receipt requirements. A good tip before sending documents, however, is to make one last check of your documents for missing signatures, dates, check boxes, and document titles. If common mistakes are not caught by your runner after receipt, you may face filing amended documents later down the line or see a rejection of your filings altogether.

# Tips For Working with a Runner, cont.



Serving documents is a whole other field altogether. Instead of working with a court for filing of your documents, we are now working with individuals who may be a party to an action and are obligated to accept service of legal documents, or a non-party or individual in a case who will do everything in their powers to evade and deceive a process server in order to avoid being served. We will often see individuals who owe debts or are being evicted from a property to be the craftiest in drawing out an action. Several obstacles process servers might see in the field are inaccessible locations or properties, vacant or bad addresses, or unwilling or difficult contacts.

You may first think of what kind of party to be served in a matter and their capacity. If a party being represented by an attorney is to be served, that process is considered a delivery pursuant to Code of Civil Procedure section 1011a and is simple to complete, and may be the majority of your field-work if not serving yourself via mail. If serving, for example, a defendant in a matter for a new case which involves collecting money or an incident stemming from an auto accident, you may be dealing with a subject that knows service is imminent and will try to avoid service. It is in good practice to provide your server, if possible, subject descriptions and valid addresses. A quick search online of a subject property will alert you with any obstacles a server might encounter when attempting service, such as gated communities, what area of the property can or may be entered, if there are any visible "beware of dog" signs on fences or property lines, or if that address is even valid. If a gated community, does your client know or have access to a gate code? Does your client know what vehicles may be present that belong to the subject being served? What might the subject look like? The more information you can arm your process server, the more prepared he or she can be to investigate and effect proper service. Feel free to ask your server to also speak to neighbors to establish if a subject is known to the address being attempted, or even expect it. The reports you may receive from your process server can then provide you and your staff with suggestions on how to complete a service.



In all, open communication with your court runners and process servers can greatly help to complete your assignments outside of the law firm. As some firms may operate differently than others, always try to establish a relationship with a support company that best fills your niche as far as communication and thoroughness.



*Alexander Cain began working in the legal field in 2005 as a bicycle courier, and has since held various management positions with a few leading legal support services in the Sacramento Area. In 2017, he started his own company, Dauntless Legal Services, LLC, and provides support services to demanding law firms and support services alike throughout California and the US.*



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PLEASE CHECK IF APPLICABLE (INCLUDE TITLE):  
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POSTMARKED ON OR BEFORE JANUARY 18, 2019	___ @	\$150.00	\$ _____
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REGISTRATION ON OR BEFORE JANUARY 18, 2019	___ @	\$25.00	\$ _____
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WELCOME RECEPTION (FRIDAY)	___ @	\$30.00	\$ _____
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*PRESIDENTS LUNCHEON (SATURDAY)	___ @	\$32.00	\$ _____
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* <input type="radio"/> SOUTHWESTERN CHICKEN WRAP <input type="radio"/> ROAST BEEF ON SOUR DOUGH <input type="radio"/> ROASTED VEGETABLE SANDWICH			
BANQUET (SATURDAY):			
<input type="radio"/> MACADAMIA MAHI MAHI <input type="radio"/> HERB GRILLED CHICKEN <input type="radio"/> ROASTED VEGETABLE WELLINGTON	___ @	\$73.00	\$ _____
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Quadruple \$189.00 per night

Check in is 4 p.m. Check out is 12 p.m.

RESERVATIONS: 1.800.938.2532 GROUP CODE: 190214Legal



Deadline to reserve your room is January 21, 2019-No Room Rate Guarantee After This Date!

- Parking: Complimentary Self-Parking or Valet Parking
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Transportation: Super Shuttle http://www.supershuttle.com/default.aspx?GC=CT8WB
Internet: Complimentary in guest rooms and meeting rooms

Viejas Casino and Resort offers eight dining venues, and of course-a casino! Right across the street you will find an outlet mall, additional dining options, an outdoor roller rink, bingo, bowling alley, and arcade.

PLEASE NOTE: Viejas will not allow ice chests on the premises.

For additional information contact:

THIRD QUARTERLY CONFERENCE CO-CHAIRS

Leanna Pierce
619.248.0970
lpierce@morrislawfirmapc.com

Renee Evans, CCLS
619.823.7332
renee.evans915@yahoo.com



**LEGAL  
SPECIALIZATION  
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**February 16, 2019**

Deadline to register without late fee: February 11

Section Member - Free | All others - \$15

**11:00AM - 12:00PM**

***Civil Litigation***

**"Bull" Jury and Trial Consulting:  
The How's and Why's of Jury Consulting**  
Leticia Ostler and Jeremy Ostler

***Law Office Administration***

**Defense of Wage and Hour Claims**  
Lisa Hird Chung, Esq.

**3:00PM - 4:00PM**

***Criminal and Family Law***

**Domestic Violence  
Family Law & Criminal Aspects**  
Stefano L. Molea, Esq. and Elizabeth Molea, Esq.

***Probate and Estate Planning***

**Administering Trusts in Life and at Death**  
Nicole M. Paschoal, Esq.

**4:30PM - 5:30PM**

***Federal Law***

**Calendaring, Filing Motions, Trial Readiness**  
Joe Diaz, CM/ECF Coordinator  
USDC Southern District of California

***Specialty Law***

**Tribal Governments and the California Law Practice**  
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<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**REGISTRATION WILL CLOSE ON FEBRUARY 21, 2019.**  
 No refunds after February 18, 2019.

Name: \_\_\_\_\_ E-mail: \_\_\_\_\_  
 Phone: \_\_\_\_\_ Local LSI Association: \_\_\_\_\_ (No abbreviations.)  
 Questions for the Speaker: \_\_\_\_\_

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(Select one)

(Select one)

Northern California

Saturday, March 16, 2019

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Saturday, September 21, 2019

- **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.
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<b>EXAMINATION FEES</b> (Select Payment Type)	<b>Check</b> <input type="checkbox"/> Payable to "LSI" Mail to above address	<b>PayPal</b> <input type="checkbox"/> Email exam application to <a href="mailto:CCLSCertifyingBoard@gmail.com">CCLSCertifyingBoard@gmail.com</a> Payment link will be provided upon confirmation of eligibility to sit for exam.
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On Time Registration Fee \$ 25.00	On Time Registration Fee \$ 75.00	
Examination Fee* 100.00	Examination Fee* 100.00	
Late Fee (if applicable) 45.00	Late Fee (if applicable) 45.00	
<b>TOTAL DUE w/o Late Fee: \$125.00</b>	<b>TOTAL DUE w/o Late Fee: \$175.00</b>	

### 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. September 2018

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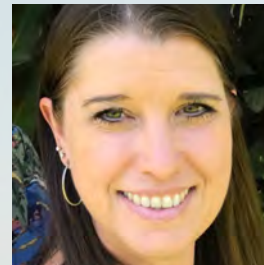
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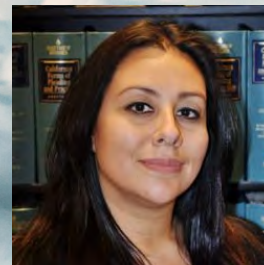
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