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Sacramento Legal Secretaries Association



THE LEGAL EAGLE



October Events

- **October Regular Dinner Meeting – October 18.** This meeting will be held at the Courtyard Marriott - Midtown Sacramento, 4422 Y Street, Sacramento. You can register online through our website (www.slsa.org) or contact Shelly Reyes at reservations@slsa.org. *See page 21.*
- **Birthday Magic – October 25.** Please see the flyer in this bulletin on page 23 for more information on how you can help with this event. Email Crystal Rivera at crivera@somachlaw.com. *See page 23.*
- **FairyTale Town – Safe & Super Halloween – October 26-28.** Volunteers needed to dress in costume and help hand out candy to the children on one or more nights! Email Dawn Forgeur, CCLS at drforgeur@stoel.com. *See page 22.*

Mission Statement

The Sacramento Legal Secretaries Association (“SLSA”) is a nonprofit, educational organization whose purpose is to further knowledge of law and its procedures, promote a high standard of ethics, encourage a statewide networking system, and advance the interests of our members and the legal community.

NON-MEMBERS ARE WELCOME!





Dawn Forgeur, CCLS

President's Message

by Dawn Forgeur, CCLS

SLSA has a busy month planned for October! We start off with our dinner meeting on October 18 and our speakers will be teaching us "The ABCs of Filing a Writ of Mandate" in the Third District Court of Appeals. Our speakers will be Colette Bruggman and Darlene Warnock. You can sign up on our website (www.slsa.org/events) or you can fill out the flyer in this issue and email it directly to Shelly Reyes at reservations@slsa.org.

year is A Grimm Halloween and our location will be transformed into Sleeping Beauty's Castle. We need volunteers to dress up and help hand out candy and assist with the activities for the kids. You do not need to be there for all three nights, even helping for at least one night that weekend would be great. Please contact me at drforgeur@stoel.com if you would like to help.

Next on October 25, we have our first Charitable Project event – Birthday Magic! The Char-

I am happy to report that Past President Debbie Frias, CCLS, has volunteered to be our Legal Procedures Chair! We are very pleased to

"Thank you to the many volunteers who are helping to make this year great for SLSA." ~Dawn Forgeur, CCLS



itable Projects Committee is looking for volunteers for this event to donate presents, goody bag items, and various other items needed. Please see the Charitable Projects Committee's flyer for more information and contact information.

have her on board and you can find her first article in this bulletin.

Finally, SLSA is once again participating in Fairytale Town's Safe & Super Halloween, which takes place on October 26, 27, and 28 from 5:00 p.m. to 9:00 p.m. each night. The theme this

Thank you to the many volunteers who are helping to make this year great for SLSA. SLSA is a completely volunteer organization and SLSA couldn't be what it is without these volunteers help!



CHANGE OF ADDRESS:

Please remember if you have moved offices or home, be sure to send us your Change of Address form so that we can update our records. This will minimize any delay in your receiving our monthly bulletin, any correspondence, and the LSI quarterly magazine. The change of address form can be found in this bulletin or on our website. They should be mailed to our Vice President and Membership Chair, Lynne Koroush, to her work address at Greenberg Traurig, LLP, 1201 K Street, Ste. 1100, Sacramento, CA 95814.

October Membership Chair Report

by Lynne Koroush

Welcome, and congratulations to the following new SLSA members, who were inducted at the September 20, 2012, regular membership meeting.

Active Membership

Shannon O'Neil – Shannon is a file clerk at Stoel Rives, and has been a legal professional since 2009. She specializes in litigation. Shannon celebrates her birthday on August 29, and enjoys history, traveling, and the outdoors.

Jennifer Sachs – Jennifer is a records clerk at Murphy Pearson Bradley Feeney, and has been a legal professional since 2007. She specializes in litigation and celebrates her birthday on October 29.

Carmela Maldonado – Carmela is a legal assistant with the Law Office of Thomas A. Johnson, and has been a legal professional since June 2011. She specializes in criminal law, and celebrates her birthday on June 26.

Jenny Lynn Mackey – Jenny is a paralegal at Montague & Viglione, and has been a legal professional since 2006. She specializes in litigation, business/corporate law, and law office management. Jenny celebrates her birthday on April 15, and enjoys cooking, sports, and reading.

Stephanie Porteous – Stephanie is a legal assistant with Montague & Viglione, and has been a legal professional since 1985. She specializes in litigation, and celebrates her birthday on February 3. She enjoys cooking and outdoor activities.

Erin Ryan – Erin is a legal secretary with Klinedinst P.C., and has been a legal professional since 2008. She specializes in litigation. Erin celebrates her birthday on June 7.

Wendy Jones – Wendy is a legal secretary at Downey Brand. She has been a legal professional since 1996 and specializes in water law. Wendy celebrates her birthday on July 26, and enjoys reading, watching movies, and her animals.

Associate Membership

Margret Salmon - Margret is presently seeking employment in the legal field, and has been a legal professional since 1983. She specializes in administrative law and celebrates her birthday on August 18. She enjoys reading, sewing, knitting, and hiking.

Lindsie Strand – Lindsie is presently seeking employment in the legal field, and has been a legal professional since 2006. She specializes in bankruptcy, criminal law, family law, litigation, and real estate law. Lindsie celebrates her birthday on June 30, and enjoys photography, martial arts, and soccer.

If you are interested in membership in SLSA, please contact Lynne Koroush at (916) 442-1111, or via e-mail at koroush1@gtlaw.com.

Congratulations!

To SLSA member **Lori McCleerey** on the birth of her first grandchild, Brynn Elizabeth, born August 30, 2012.



CHANGES?? UPDATES??

Are you an SLSA member who has moved? Changed jobs? Been promoted? Recently engaged or married? New addition to the family? We want to know about you!! Let us celebrate your accomplishments with you during the good times, and support you during the tough times. Please send your news to koroush1@gtlaw.com.

Employment Report/Positions Available

by Jaymie Moralez



This free benefit provides the legal community with a place to post job openings for all categories of job positions. SLSA assists in every possible manner to procure employment for members of this association, and cooperates with attorneys in filling positions in law offices, but in no event does this committee act as an employment agency.

Employers/Attorneys will need to give the following information to the Employment Chair: name, firm name, address, phone number(s), areas of law practice, software used, position available, and years of experience required. The attorney/employer is requested to e-mail the Employment Chair with the advertisement formatted like those currently posted on the "Employment Opportunities" page. Ads are usually posted within 48 hours.

It is the responsibility of the applicants to contact the employers, schedule interviews, exchange résumés, and to discuss benefits and salary, etc. All information is listed until notification to drop the name/position is given to the Employment Chair.

Please contact Employment Chair Jaymie Moralez, at (916) 446-7979, or e-mail her at jmoralez@somachlaw.com. A detailed message can be left, and your call will be returned within 24 hours. If you wish your listing to be placed on our web page, please indicate your authorization to do so.

- (9/18/12) Legal Secretary/Floater. Downey Brand LLP, Sacramento's largest law firm, seeks a Litigation Secretary/Floater for its Downtown Sacramento office. Candidates must have significant (5+ years) experience in a litigation environment, and have thorough knowledge of federal and state court procedures and timelines. Requires 75+ wpm accurate typing, word processing and proficiency with MS Office applications. Ability to accurately proofread documents, set priorities and work under pressure is critical. Must have a positive attitude, strong written and verbal communication skills, impeccable attendance and punctuality, a strong work ethic, and be highly organized with an extreme level of attention to detail. There is potential for the person hired for this position to receive a permanently assigned desk. Salary commensurate with experience, firm-paid health benefits, and parking are provided. Qualified applicants may submit a cover letter and resume in confidence to Camilla Arnds, Human Resources Director, via the firm's web application by clicking here. No e-mails or telephone calls please.
- (9/17/12) Executive Legal Secretary. Well-established workers' compensation defense law firm in Sacramento seeks an experienced Executive Legal Secretary. Candidates must possess excellent organizational, written/verbal communication and time management skills. 3-5 years experience. Excellent pay and benefits. Salary negotiable DOE. Fax resumes to Kalie Wikel at (916) 924-3541.
- (9/13/12) Receptionist/Legal Secretary. Folsom law office seeks a full-time receptionist/legal secretary with a minimum of 1 year experience. You will welcome visitors by greeting them, in person or on the telephone; answering or referring inquiries. Maintain reception area and conference room. Familiar with basic legal terminology and law office tasks including but not limited to photocopying, preparing client files and subfiles, filing, calendaring, scheduling appointments, drafting basic letters and scanning documents. Must be punctual, detail oriented, honest and dependable. Strong knowledge of MS Office, including Word, Excel and Outlook is required. Compensation depends on experience. To be considered for this position, please email your cover letter and resume to deborahcarrillo3@gmail.com.
- (8/26/12) Experienced Legal Secretary - 30 hours per week. Evers Law Group seeks an experienced litigation secretary for its office in Sacramento. Evers Law Group is a small firm which maintains a casual yet professional environment. See Employment, Page 5

Employment Report/Positions Available (cont.)

by Jaymie Moralez

Candidates must have at least five years of litigation experience and have thorough knowledge of civil procedures and relevant timelines. The candidate must also have very strong typing skills, transcription skills, word processing skills, proofreading skills, excellent written and verbal communication skills, and proficiency in WordPerfect, Words, AdobePro, Abacus and Timeslips. Team players need only apply. Send your resume along with hourly pay requirements to: k.evers@everslaw.com. No telephone calls please.

- (8/20/12) Legal Administrative Assistant. RagingWire Data Centers, Inc., is seeking full time person to handle a range of responsibilities including preparing initial versions of all client contracts (standard MSA and standard SLA), manage the contract signature process and distribute signed versions, create and distribute the client services version and NOC version of the signed SLA, draft letters and other correspondence. Review vendor contracts and non-disclosure agreements, review changes made by potential clients to RagingWire MSA and SLA, organize all incoming contracts, correspondence, requests for information, etc. Prepare census information and various government filings (e.g., annual state officer filings, court required bankruptcy claims against third parties. Prepare insurance applications for the company's risk management programs.

Will also act as first point of contact with the company's insurance brokers, determine priorities, and assist manager in addressing and responding to internal and external requests.

Maintain all relevant client contract information through Salesforce.com. Interact with colleagues regarding updates and other changes/modifications. Draft client change order language, maintain stock option spreadsheets, create and print individual stock options from templates. Maintain stock certificate spreadsheets, create and print individual stock certificates from templates, interact with employees at all levels and with all the company's departments. Perform various research projects as requested by department heads. Salary is depending upon experience. Medical benefits provided. Software used is Microsoft Word, Excel, and PowerPoint. Please email resume to tmanriquez@ragingwire.com. Position available immediately.



**APPLICATION FOR MEMBERSHIP IN
SACRAMENTO LEGAL SECRETARIES ASSOCIATION**

COMPLETE AND DELIVER THE ORIGINAL APPLICATION, WITH CHECK PAYABLE TO SLSA, FOR \$40 (\$25 FOR STUDENTS) WHICH INCLUDES LOCAL DUES, ANY INITIATION FEE, AND LEGAL SECRETARIES, INCORPORATED (LSI)* PER CAPITA TAX, TO:

**Lynne Koroush, Vice President
Greenberg Traurig LLP
1201 K Street, Suite 1100
Sacramento, CA 95814**

NAME OF APPLICANT _____
EMPLOYER _____ POSITION _____
MAILING ADDRESS _____ CITY/ZIP _____
BUSINESS TELEPHONE (____) _____ RESIDENCE TELEPHONE (____) _____
BUSINESS E-MAIL _____ RESIDENCE E-MAIL _____
EMPLOYMENT IN THE LEGAL FIELD (INCLUDE POSITIONS, DATES) _____

PREVIOUS MEMBERSHIP IN A LEGAL SECRETARIES ASSOCIATION (INCLUDE ASSOCIATIONS, DATES) _____

IF ACCEPTED AS A MEMBER, I AGREE TO BE BOUND BY THE BYLAWS AND STANDING RULES OF LEGAL SECRETARIES, INCORPORATED, AND THE LOCAL ASSOCIATION TO WHICH I HEREBY APPLY FOR MEMBERSHIP, INCLUDING THE FOLLOWING CODE OF ETHICS:

IT SHALL BE THE DUTY OF EACH MEMBER OF LEGAL SECRETARIES, INCORPORATED TO OBSERVE ALL LAWS, RULES AND REGULATIONS NOW OR HEREAFTER IN EFFECT RELATING TO CONFIDENTIALITY AND PRIVILEGED COMMUNICATION, ACTING WITH LOYALTY, INTEGRITY, COMPETENCE AND DIPLOMACY, IN ACCORDANCE WITH THE HIGHEST STANDARDS OF PROFESSIONAL CONDUCT. (Dedicated to the memory of Joan M. Moore, PLS, CCLS, LSI President 1980-82.)

SIGNATURE OF APPLICANT _____ DATE _____
SPONSOR _____ APPLICATION APPROVED _____

~ ~ LSI LEGAL SPECIALIZATION SECTIONS MEMBERSHIP ~ ~

LSI MEMBERS MAY ALSO JOIN ONE OR MORE OF THE FOLLOWING LSI LEGAL SPECIALIZATION SECTIONS:

- ~ CIVIL LITIGATION
- ~ CRIMINAL LAW
- ~ FAMILY LAW
- ~ LAW OFFICE ADMINISTRATION
- ~ PROBATE/ESTATE PLANNING
- ~ TRANSACTIONAL LAW

SPECIALIZATION SECTION MEMBERSHIP INCLUDES: (1) QUARTERLY SECTION NEWSLETTERS; (2) FREE QUARTERLY CONFERENCE WORKSHOPS; (3) REDUCED REGISTRATION FEES FOR REGIONAL SPECIALIZATION SECTIONS SEMINARS; AND, (4) ROSTER LISTING EACH SECTION MEMBER'S NAME, CONTACT INFORMATION, EXPERTISE AND GEOGRAPHICAL AREA WITH WHICH FAMILIAR. SECTION DUES ARE NOMINAL AND A DISCOUNT IS OFFERED FOR MEMBERSHIP IN ALL SIX SECTIONS.

FOR LSI LEGAL SPECIALIZATION SECTIONS MEMBERSHIP AND DUES INFORMATION, VISIT LSI'S WEBSITE AT www.lsi.org; or, TRANSMIT A COPY OF THIS ENTIRE PAGE OF YOUR APPLICATION TO:

LEGAL SPECIALIZATION SECTIONS COORDINATOR
LSI CORPORATE OFFICE
P.O. BOX 660
FORTUNA, CA 95540-0660
FACSIMILE: 707.725.1344 E-MAIL: lsiorg@suddenlinkmail.com

(Form adopted 5/01; revised 5/08)

* ACCOMPANYING MEMBERSHIP IN LEGAL SECRETARIES, INCORPORATED, A CALIFORNIA NON-PROFIT MUTUAL BENEFIT ASSOCIATION, INCLUDES SUBSCRIPTION TO THE LEGAL SECRETARY MAGAZINE, REDUCED ANNUAL DUES FOR MEMBERSHIP IN LEGAL SPECIALIZATION SECTIONS AND DISCOUNTED PRICES ON PURCHASE OF LSI LEGAL PROFESSIONAL'S HANDBOOK AND LAW OFFICE PROCEDURES MANUAL.

SLSA and LSI MEMBERSHIP APPLICATION (continued)

Name: _____ Birthday _____

Talents, Interests, Hobbies: _____

YOUR SPECIALTY:

<input type="checkbox"/> Administrative Law	<input type="checkbox"/> Criminal Law	<input type="checkbox"/> Real Estate Law
<input type="checkbox"/> Appellate Law	<input type="checkbox"/> Family Law	<input type="checkbox"/> Taxation
<input type="checkbox"/> Arbitration	<input type="checkbox"/> Law Office Management	<input type="checkbox"/> Other
<input type="checkbox"/> Bankruptcy	<input type="checkbox"/> Litigation	Specify: _____
<input type="checkbox"/> Business/Corporate Law	<input type="checkbox"/> Probate/Estate Planning	_____

EDUCATION:

<input type="checkbox"/> High School Diploma	<input type="checkbox"/> Four Year Bachelor's Degree
<input type="checkbox"/> Secretarial Training Course	<input type="checkbox"/> Additional Education Above Four Year Degree
<input type="checkbox"/> Two Year Junior/Business College	

TYPE OF OFFICE:

<input type="checkbox"/> Law Office	<input type="checkbox"/> Self-Employed
<input type="checkbox"/> Government Services	<input type="checkbox"/> Corporate Legal Department
<input type="checkbox"/> Court System	<input type="checkbox"/> Other Specify: _____

BENEFITS PROVIDED BY YOUR EMPLOYER: (Check all that apply)

<input type="checkbox"/> Retirement/401(k)	<input type="checkbox"/> Major Medical	<input type="checkbox"/> Vacation
<input type="checkbox"/> Disability Income Plan	<input type="checkbox"/> Life Insurance	<input type="checkbox"/> Dental
<input type="checkbox"/> Hospitalization	<input type="checkbox"/> Vision	<input type="checkbox"/> Other
	Specify: _____	

CHECK HERE IF YOUR EMPLOYER PAYS FOR YOUR MEMBERSHIP DUES

CHECK HERE IF YOUR EMPLOYER PAYS FOR MONTHLY DINNER MEETINGS

CHECK HERE IF YOU ARE WILLING TO HOLD A STANDING COMMITTEE CHAIR OR ASSISTANT CHAIR POSITION

WHERE WOULD YOU LIKE YOUR E-MAIL DELIVERED? [] BUSINESS [] RESIDENCE

SLSA respects your privacy. If you do NOT want to be listed in SLSA's membership roster, check here: []

How did you hear about SLSA? _____

Please make your check payable to **SLSA** in the amount of \$40 (\$25 for students). Mail payment with this form to:

Lynne Koroush, Vice President
Greenberg Traurig LLP
1201 K Street, Suite 1100
Sacramento, CA 95814



**PLACER COUNTY LEGAL PROFESSIONALS' ASSOCIATION
PRESENTS**

**fall LUNCHEON
AND
BUNCO**

SATURDAY, OCTOBER 20, 2012

12:00 – 4:00 P.M.

SALAD AND POTATO BAR

**DEWITT SENIOR CENTER
11576 D AVENUE
AUBURN, CA**

**\$20 PER PERSON ADVANCE PURCHASE
\$25.00 AT DOOR**

**FOR INFORMATION/TICKETS CALL:
VICKI YOUNG (530-269-3440)
or MARY AYALA (916) 207-0083**

**Checks can be made payable to: PCLPA
Mail to: Vicki Young, 9460 Upper Valley Road, Auburn CA 95602**

October 2012



Dates to Remember

Sun	Mon	Tue	Wed	Thu	Fri	Sat
	1	2	3	4	5	6
7	8 SLSA Executive Board Meeting	9	10	11	12	13
14	15	16	17	18 Regular Dinner Meeting	19	20 Placer County LPA's Luncheon and Bunco CCLS Exam
21	22 Last Day to submit Articles for Bulletin	23	24	25 Birthday Magic	26 Fairytale Town's Safe and Super Halloween	27 Fairytale Town's Safe and Super Halloween
28 Fairytale Town's Safe and Super Halloween	29	30	31 Halloween			

- **October 8 - Columbus Day/Courts Closed**
- **October 8 - SLSA Executive Board Meeting** (Location: Stoel Rives - Time: 6:00 p.m.)
- **October 18 - Regular Dinner Meeting** (Location: Courtyard Marriott—Midtown, 4422 Y Street, Sacramento, CA, 5:30 p.m.)
- **October 20—Placer County LPA's Fall Luncheon and Bunco** (Location: Dewitt Senior Center—11576 D Avenue, Auburn, CA, 12:00 p.m., see flyer on page 8 for more details.)
- **October 22- Last Day to Submit Articles for the November issue of The Legal Eagle**
- **October 25 - Birthday Magic** (Location: Sacramento Area Emergency Housing Center's Family Shelter, Oak Park Area, Sacramento, 6:00 p.m., see flyer on page 23 for more details.)
- **October 26-28 - Fairytale Town's Safe and Super Halloween** (Location: Fairytale Town, 3901 Land Park Drive, Sacramento, 5:00 p.m., see flyer on page 22 for more details.)
- **November 5 - SLSA Executive Board Meeting** (Location: Stoel Rives - Time: 6:00 p.m.)
- **November 6 - Election Day - Don't forget to vote!**
- **November 6 - Lunch Lesson** (Location: Downey Brand, 621 Capitol Mall, 18th Floor, Sacramento, See flyer page 34 for more details.)
- **Veteran's Day/Courts Closed.**
- **November 15 - Regular Dinner Meeting** (Location: Courtyard Marriott—Midtown, 4422 Y Street, Sacramento, CA, 5:30 p.m.)
- **November 16-18 - Conference** (Location: Hilton Palm Springs — 400 East Tabquit Canyon Way, Palm Springs, CA), see flyer pages 26-27 for more details.)
- **November 19 - Last Day to Submit Articles for the December issue of The Legal Eagle**
- **November 22 -23 Thanksgiving Holiday/ Courts Closed.**

Benefit Highlights

Costume Discounters.

Costume Discounters is an online leader in costumes. With over 20K products to choose from, free exchanges, awesome promos & same day shipping you will find the perfect outfit at the perfect price. Costume Discounters also offers an industry leading 120% price match guarantee, and free shipping on \$70+.

25% off on valid costume purchases only, through 10/31/12.

Costume SuperCenter.com

Costume SuperCenter is the world's first online costume superstore, offering over 4,000 different products, including child and adult costumes, accessories and holiday decorations. With same day shipping and free size exchanges, you'll get your order in time and just the right fit.

\$20 off orders \$80+, through 10/31/12.

CAPs

by Melanie Herman

SLSA's goal for 2012-2013 is 75,000! We are well on our way at a total of 31,905, as of September 24, 2012, leaving only 43,095 more to go! SLSA would like to remind you that we gain 50 points for each Article our members submit to LSI's Editor of The Legal Secretary. If you are interested in submitting an article, let us know! Help us capture CAPs and reach our goal. E-mail Melanie and let her know that you earned SLSA points – don't make her harass you. Her e-mail is mherman@perkins-lawoffice.com. **See the Chapter Achievement Reporting Form in this bulletin for more ways to gain points.**

CCLS Quiz

by Launa Atkinson, CCLS

Legal Computations – Bookkeeping

True/False

- The Basic Accounting Equation is:
Assets = Owner's Equity + Liabilities
___ T ___ F
- The five broad classes of accounts are Assets, Liabilities, Owners Liability, Revenues and Expenses.
___ T ___ F
- A T-Account is used to record transactions. All debits and credits to business transactions are entered and summarized use the T-Account format.
___ T ___ F
- Journaling is the process of transferring the debit and credit amounts from the general journal to the general ledger.
___ T ___ F
- Revenue is the owner's claims against the assets of the firm.
___ T ___ F
- Assets normally have a debit balance.
___ T ___ F
- Liabilities and Capital normally have a credit balance.
___ T ___ F
- Credits decrease (-) assets.
___ T ___ F
- Owner's equity is decreased (-) by debits.
___ T ___ F
- Expenses are decreased (-) by debits.
___ T ___ F

See Answers, Page 25

Law Office Products/Management

Mobile Apps for Productivity (Prices and features may have changed since publication.)

Application	Description of Application and Cost
	The official Adobe Reader app has come to the iTunes App Store! With this app, users can easily read and share PDF documents, including PDF portfolios, password-protected PDFs, and Adobe LiveCycle rights-managed files, across platforms and devices. The app is FREE and may be downloaded from the iTunes App Store. For Android owners, the Adobe Reader may be downloaded for FREE from Google Play.
	Box is a great app that allows you to store, view, edit, share, and collaborate on files in a variety of formats from your device. Supported file types include Word, Excel, PowerPoint, PDFs, images, audio, videos, and Box Web documents. The app is FREE and provides 5 GB storage capacity. The app may be downloaded from the iTunes App Store for use on all iOS devices and from Google Play for Android devices.
	Bump is a FREE app compatible with the iPhone, iPod Touch, or Android that makes sharing information with other iPhone, iPod Touch, and Android owners who have Bump installed quick and easy. You can select what you want to share, hold your device, and then gently bump hands with the other Bump user. The app may be used to share photos, contacts, or to become Facebook friends. The app may be downloaded from the iTunes App Store for use on iPhone and iPod Touch devices, and from Google Play for use on Android devices.
	CardStar is a FREE app compatible with iPhone, iPod Touch, iPad, Blackberry, and Android devices that lets you store and retrieve loyalty, reward, and club membership cards, where they can be scanned directly from your screen at most merchants' stores, such as CVS, Best Buy, Blockbuster, and PetSmart. The app may be downloaded from the iTunes App Store for use on the iPhone, iPod Touch, or iPad; from Blackberry App World for use on Blackberry devices; and from Google Play for use on Android devices.
	CLE Mobile is a great tool by West that allows you to complete continuing legal education courses on their iPhone, iPod Touch, and iPad devices. With the app, users can download courses, listen to audio content, browse program materials, post to discussion forums, and submit completed courses for CLE credit. The app is FREE and may be downloaded from the iTunes App Store.
	Court Days is a handy app that helps you quickly calculate the number of court days or calendar days (or a combination of the two) before or after a given date. Very handy for calculating filing deadlines for briefs! The app is available for download for \$0.99 from the iTunes App Store and is compatible for iPhone, iPod Touch, and iPad devices.
	Days From Date Calculator is similar to the Court Days app described above, but it calculates the date for a number of days in the future or past. The app is available for purchase for \$0.99 from the iTunes App Store and is compatible with the iPhone, iPad, and iPod Touch. A similar app for Blackberry devices is available for purchase for \$4.99 from Blackberry App World.
	The Deponent App is a deposition question and answer outline app, which allows you to select from over 150 deposition questions by category (such as admonitions or expert qualifications), to organize the sequence of questions, and to link questions to exhibits (exhibits may be imported into the app using iTunes or Dropbox). The app is available for \$9.99 from the iTunes App Store and is optimized for use on the iPad.
	DocketLaw is a FREE app that enables you to calculate important event dates and deadlines based on the Federal Rules of Civil Procedure. Users with a DocketLaw or CalendarRules account can add individual courts or entire state court systems (monthly subscriptions start at \$9.95/month). The app may be downloaded from the iTunes App Store and is compatible for use on all iOS devices.
	Documents To Go Premium - Office Suite is an app that lets you edit, create, and view Word, Excel, and PowerPoint files (Office 2007 and newer versions). Other file types, such as PDF or iWork files, may be viewed with the app. Features include the ability to sync supported files stored in Google Docs, Dropbox, Box.net, iDisk, and SugarSync. The app may be downloaded from the iTunes App Store and currently costs \$16.99 (the app is also available in Google Play for \$14.99). A less-expensive version of Documents To Go is also available that includes many of the same features at a cost of \$9.99 ; however, this version of the app does NOT include the ability to edit of PowerPoint files or the ability to view, edit and sync files stored in Google Docs, Box.Net, Dropbox, iDisk, or SugarSync.

Law Office Products/Management (cont.)

Mobile Apps for Productivity (Prices and features may have changed since publication.)

	<p>Dropbox is a great productivity app, which serves as a cloud-based, shareable virtual file system. The app is FREE and allows you to view documents, spreadsheets, presentations, videos, and photos, export files to other iPhone, iPad, or Android apps, and more. The app requires a Dropbox account to function, but if you do not have an account, the app will allow you to create one for free. The app may be downloaded from the iTunes App Store for use on iPhone and iPad devices, and from Google Play for use on Android devices.</p>
	<p>RLTC: Evidence is an app described as "image presentation software built for trial lawyers." The app lets you organize and annotate documents and images on the iPad and then present those documents using a VGA adapter. The app requires iOS 4.2 and is optimized for use on the iPad. It is available for \$4.99 for download from the iTunes App Store.</p>
	<p>Exhibit A is an app intended to assist you with the organization and presentation of information. Documents may be imported using iTunes, WiFi, FTP, e-mail, or Dropbox, and supported file types include JPG, TIFF, GIF, PNG, PDFs, and video. The app is available for \$9.99 and may be downloaded from the iTunes App Store.</p>
	<p>The GoodReader app is a robust reader that was named the top-selling, non-Apple app for the iPad in 2010. The app lets you view and annotate a variety of file types, including PDF, text, Word, PowerPoint, Excel, and iWork files. Media file formats are supported as well. The app integrates easily with Google Docs, Dropbox, SugarSync, Box.net, and FTP and SFTP servers. The app currently costs \$4.99 and may be downloaded from the iTunes App Store.</p>
	<p>iJuror is a mobile app developed for use on the iPad that aims to help facilitate the jury selection process. The app allows you to tap on seats to add juror information, add notes as the trial proceeds, and to drag and drop juror avatars to select jurors and alternates, or to dismiss jurors. The app is currently available for \$9.99 and may be downloaded from the iTunes App Store.</p>
	<p>Impress - PDF Watermarker is an iOS app that enables users to watermark any PDF file with any text, pre-defined stamps, image, or other user-generated content. The app is available in the iTunes App Store for \$2.99 for use on iOS devices.</p>
	<p>iPleading is an app intended to assist you in creating pleadings on their mobile devices. The app may be purchased for iOS devices for \$4.99 from the iTunes App Store and for Droid devices for \$4.99 from Google Play.</p>
	<p>Jury Duty is a mobile app intended to assist you during the voir dire process. Features include the ability to create customized seating charts for particular courtrooms, record impressions of potential jurors, and to select and track voir dire topics. The app is available for \$29.99 from the iTunes App Store and is optimized for use on the iPad.</p>
	<p>The JuryTracker app is another app intended to assist you with jury selection and observation. The app may be used to store notes concerning jurors and features a number of emoticons that can be selected to describe juror activity. The app is available for \$4.99 and may be downloaded from the iTunes App Store.</p>
	<p>West's My Legal Projects is a handy productivity app that helps you organize task lists and set up deadline reminders for legal research assignments. Notes taken with the app can be shared via email or Bluetooth. The app can link directly into WestlawNext (<u>subscription required</u>). The app may be downloaded from the iTunes App Store for \$1.99.</p>
	<p>The MyPoint app allows your device to function as a remote control for PowerPoint presentations on Windows and Mac OS X. The app is FREE and may be downloaded from the iTunes App Store for use on the iPhone, iPod Touch, and iPad. To use the app with your computer, a small application must also be installed on your computer, which is available on the developer Didonai's website.</p>

Law Office Products/Management (cont.)

Mobile Apps for Productivity (Prices and features may have changed since publication.)

	<p>My RealPractice is a FREE, secure, cloud-based app that aims to assist solo practitioners and small law firms attract and retain more clients, manage their work, and increase their productivity. The app allows users to manage and retrieve contacts, track time and billing, create and manage key matters and track tasks, and receive and respond to prospective client leads. The app may be used on all iOS devices and may be downloaded from the iTunes App Store.</p>
	<p>Office² HD is an app that lets you view, create, and edit Word and Excel files on your iPad (PowerPoint files will soon be supported). The app can sync with Google Docs, Dropbox, and iDisk. The app currently costs \$7.99 and may be downloaded from the iTunes App Store for use on all iOS devices.</p>
	<p>The Oral Argument app by TabLit is a mobile app developed by litigators for litigators, intended to provide convenient access to case materials to be used in the course of oral argument in court. The app is optimized for use on the iPad and is currently available for download from the iTunes App Store for \$19.99.</p>
	<p>The Parallels Mobile app is a tool for Mac owners that allows you to access your desktop Mac remotely from your iPad, iPhone, or iPod Touch. To use the app, Parallels Desktop for Mac must be installed on the desktop Mac as well. The app is \$4.99 and may be downloaded from the iTunes App Store.</p>
	<p>PDF Reader Pro Edition is an excellent mobile PDF reader created by iTech Development Systems. The app is optimized for use on iPhone, iPod Touch, and iPad devices and allows you to transfer your PDF files to your device from your computer or directly from any website. The iPhone and iPod Touch version of the app is \$1.99 and is available for download in the iTunes App Store. The iPad version of the app is \$9.99 and also may be downloaded from the iTunes App Store.</p>
	<p>The Quickoffice Pro HD is optimized for iPhone and iPod Touch devices, and allows you to easily edit Microsoft Word and Excel documents. The app offers integrated access to multiple cloud services, MobileMe, Dropbox, Google Docs, and Box.net. Forthcoming updates will also allow users to create and edit PowerPoint files. The iPad version of the app is currently available for purchase for \$19.99 and may be downloaded from the iTunes App Store. For Android devices, the app is available for \$19.99 and may be downloaded from Google Play.</p>
	<p>The PDF Recombinator is a new app for iOS devices that enables users to make structural edits to PDF files, such as rearranging, cropping, deleting, and inserting pages in a PDF file. The app also enables users to import and export PDF files to other apps. PDF Recombinator is currently available for download for \$4.99 in the iTunes App Store.</p>
	<p>Rocket Matter is a legal time and billing app created with small and mid-sized law firms in mind. The app provides ready access to your calendar, contacts, and billing information and enables protection of such information with enhanced security features via user-defined passcodes. The app is FREE and may be downloaded from the iTunes App Store for use on iOS devices.</p>
	<p>The Time Master + Billing app is a handy time-keeping app for attorneys who often work out-of-pocket. The app allows you to track time by start, stop, and/or by duration; keep multiple running timers, organize time records by client, track expenses, and more. The app is currently available for use on iPhone, iPod Touch, and iPad devices, and may be downloaded for \$9.99 from the iTunes App Store.</p>
	<p>The TrialPad app is specifically designed for litigators and attorneys to facilitate the preparation and presentation of compelling demonstrations for trial. The app allows users to annotate, highlight, and redact PDF documents and also serves as a file management system. The current 2.0 version of the app supports a wide array of file formats, including PDF, JPG, GIF, PNG, TIF, TXT, as well as Microsoft and Apple file formats. Video formats are supported as well. A video demonstration of the app at work is available on the developer's website, http://www.trialpad.com/. The app is optimized for use on the iPad and may be downloaded from the iTunes App Store for \$89.99.</p>



Melanie Herman

Governor's Report

by Melanie Herman

As was presented in last month's bulletin, LSI's Marketing Committee provided the local associations with four possible new logos for LSI. At our September dinner meeting we opened the floor to the members to discuss their thoughts and opinions on the possible new logos. From that discussion and emailed opinions, I was able to submit the following response to LSI Vice President and Marketing Committee Chairman, Ms. Mary J. Beaudrow, CCLS:

Good Afternoon Ms. Mary J. Beaudrow, CCLS, Please accept this e-mail in response to your request for comments and suggestions regarding the four possible new logos for LSI. As you can imagine, when SLSA opened the floor at our last dinner meeting for comments and suggestions, everyone had their own opinions. Additionally, we sent out an e-mail to our members asking for feedback. Based on the responses received, the majority of SLSA members favor Concept # 3 (scales), with Concept # 2 close behind.

Here are a few comments and concerns we received, pertaining to Concept #3 ONLY:

At first glance, you're able to tell that it's something related to the legal field, which I feel is a real plus. You don't have to wonder what type of organization is involved. It's crisp, clear and concise – all good points in my book.

This rendition of the scales looks like a bikini top. Perhaps more definition above the two scales to make it appear that they are actually attached might help. Maybe add a thin separation strip of blue and orange above (in the white area) would help.

But in different colors (probably the blue and green colors of Concept 2).

Looks too much like a law firm and I do not like the colors.

But not the colors. Maybe if they used the blue and green from Concept #2 it might look better.

The scales of justice just didn't look enough like a scale since it has no top line going across and the base of the scale (white) is the same color as the background so it blends in.

This is a better transition from our current logo.

I have underlined two of our major concerns. A number of members and nonmembers whom were asked what they thought the image looked like either indicated that it looked like some kind of bikini/bra top or two upside-down ice cream/snow cones. SLSA strongly encourages the Marketing Committee to look into revising Concept # 3 to make the scales less cartoony and standout more.

Lastly, it was noted that the font in a few of the options is the same or very similar to the font used by The Church Of Latter-Day Saints and if we do go with one of those options, we may want to think about changing the font.

We thank you for allowing us to assist in the rebranding of LSI.

Lastly, LSI's Executive Committee gave notice of another Bylaw amendment, which will be presented and voted on at the November 2012 Conference, as follows: "The Executive Committee hereby gives notice of a Bylaw amendment to LSI Bylaw Article XIV, section 6, to insert the following language at the end: Local associations who have not complied with the annual reporting requirements of the Internal Revenue Service and Franchise Tax Board and have not provided proof of said filing to the LSI Treasurer shall not be entitled to vote unless the required proof has been submitted." During discussion at the Governors' luncheon, it was stressed that once you lose your non-profit status, it is extremely difficult to obtain it again. By adding this language to Bylaw Article XIV, section 6, the Executive Committee is simply trying to encourage local associations to timely file their annual filings so that there is no possibility of losing its non-profit status.

Should you have any questions or wish for additional information, please do not hesitate to contact me.



CHAPTER ACHIEVEMENT REPORTING FORM

Each association in LSI participates every year in the Chapter Achievement contest. An award of \$250 is presented by LSI to the highest scoring association in each membership category at the Annual Conference of LSI. Chapter Achievement Points (CAPs) are tracked during the year by SLSA's Governor. This covers activities from April 1, 2012, through March 31, 2013. This form's purpose is to track each member's activity during the course of the fiscal year. **Please complete this form each time you attend a function and mail it to SLSA's Governor.** 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? _____ (25 points)
- _____ I belong to an LSI-sponsored credit union. (100 points)
- _____ I am insured through an LSI plan. (100 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 submitted questions to LSI for use on the CCLS Mock exam.
How many? _____. (25 points per question)
- _____ I recertified as a CCLS during the 2012-2013 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 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, 2013. (100 points)
- _____ I attended a Legal Specialization Section Seminar at Quarterly or Annual
Conference. How many? _____. (50 points per seminar)
- _____ I attended a Legal Specialization Section Regional Seminar. (75 points)
- _____ I submitted an article for use in a Legal Specialization Section newsletter. (50 points)
- _____ I purchased the *Legal Professional's Handbook* (LPH) between April 1, 2012, and
March 31, 2013. (200 points)
- _____ I purchased the *Law Office Procedures Manual* (LOPM) between April 1, 2012,
and March 31, 2013. (200 points)
- _____ I purchased updates to the LPH between April 1, 2012, and March 31, 2013. (100 points)
- _____ I purchased updates to the LOPM between April 1, 2012, and March 31, 2013. (100 points)

Name: _____ Email: _____

If you have any questions or would like to email this form, you can reach the Governor at governor@slsa.org, otherwise you can mail this form to:

Sacramento LSA
Attn: Melanie Herman, Governor
Perkins & Associates
300 Capitol Mall, Ste. 1800
Sacramento, CA 95814

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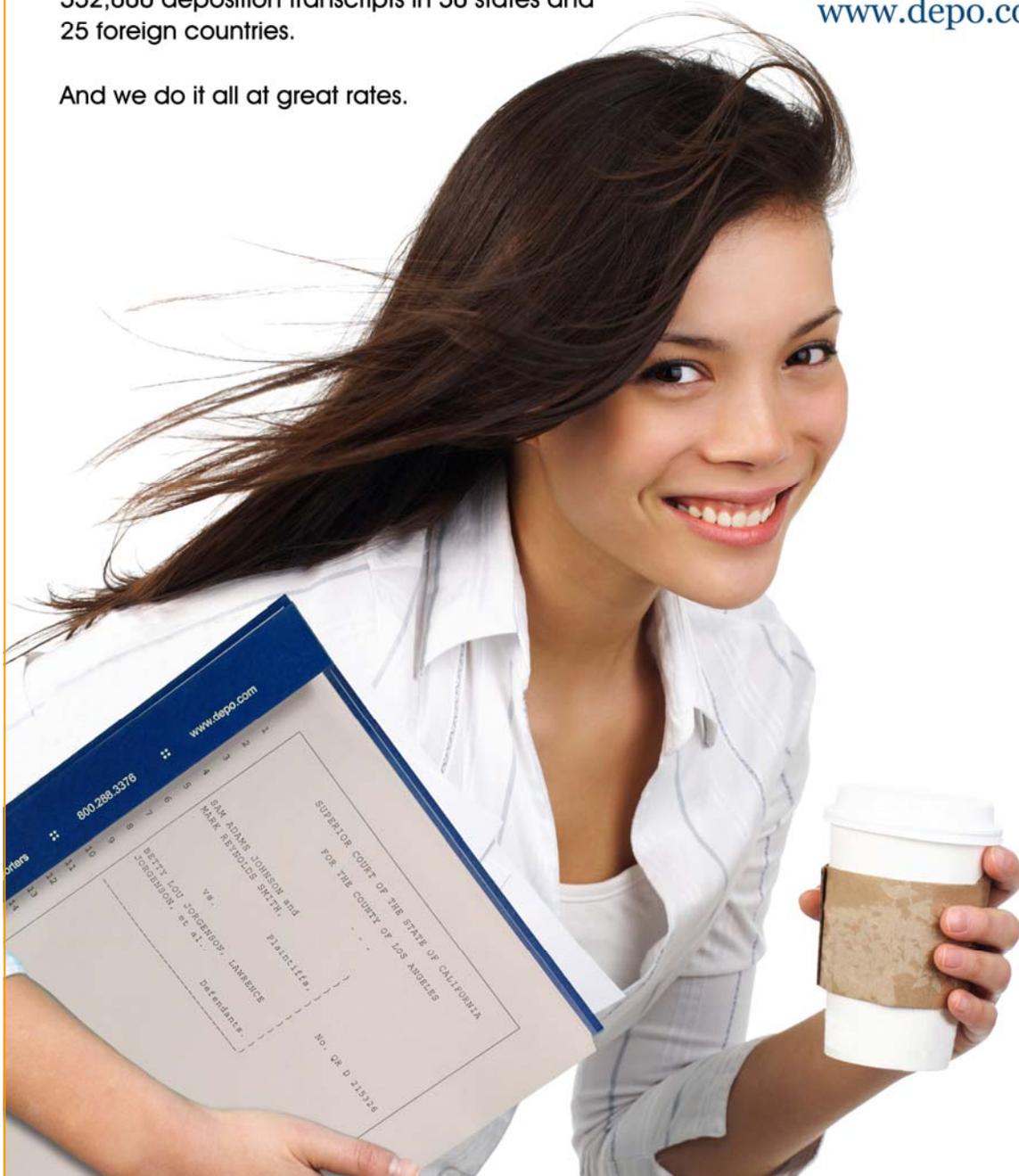
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Parliamentarian's Corner

by Astrid Watterson, CCLS

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.



*Astrid Watterson,
CCLS*

Of Note

AB 1875 (Civil Procedure: Depositions), an act to add Section 2025.290 to the Code of Civil Procedure, relating to depositions has passed out of the Legislature and was signed by Governor Brown on September 17. This bill will "limit a deposition of any person to 7 hours of total testimony, except under specified circumstances." Under the bill, the court will be required to allow additional time if necessary to fairly examine the deponent. The court will also be required to allow additional time if the deponent, another person, or any other circumstance impedes or delays the examination. The following exceptions will apply:

- Stipulation of the parties.
- Expert witness depositions.

Any case designated as complex by the court pursuant to Rule 3.400 of the California Rules of Court, unless a licensed physician attests in a declaration served on the parties that the deponent suffers from an illness or condition that raises substantial medical doubt of survival of the deponent beyond six months, in which case the deposition examination of the witness by all counsel, other than the witness' counsel of record, shall be limited to two days of no more than seven hours of total testimony each day, or 14 hours of total testimony.

To any case brought by an employee or applicant for employment against an employer for acts or omissions arising out of or relating to the employment relationship.

To any deposition of a person who is designated as the most qualified person to be deposed under Section 2025.230.

To any party who appeared in the action after the deposition has concluded, in which case the new party may notice another deposition subject to the requirements of this section.

This new provision of the Code of Civil Procedure will take effect January 1, 2013.

Also passed out of the Legislature was AB 1844, the bill that bars employers from requiring workers or job applicants to provide access to their personal Facebook, Twitter, or other social media sites. The bill, which was monitored closely by employment and labor law attorneys, supported by the California Chamber of Commerce as well as organized labor, was signed into law by the Governor on September 27, 2012.



Debbie Frias, CCLS

Legal Procedures

by *Debbie Frias, CCLS*

PERSONAL INJURY CASES FROM A LEGAL SECRETARIAL STANDPOINT

The basic personal injury case starts with the interview of the client, who has been injured - automobile, slip-and-fall, etc. In our office, the attorney conducts the interview and obtains signatures on all of the internal documents, i.e., fee agreement, medical release authorizations, authorizations for release of accident reports from law enforcement agencies, and an insurance authorization under section 2695.2(c), California Code of Regulations, Title 10, Chapter 5. Many offices use a questionnaire and ask the client to complete it. Ours covers personal information, such as name, address, phone number, SSN, date of birth, name of spouse, etc. It describes the incident in question, including names of witnesses and facts. It asks for defendant information and whether a police report was issued so we may obtain the traffic collision report. The questionnaire also asks about health - current and past - and any specific injuries. It also inquires as to medical treatment, as well as loss of wages, as a result of the incident, and any other damages incurred.

Once this information is obtained and conflict checks completed, the file is opened. In personal injury practice and from the standpoint of a plaintiff firm, the next step is to protect the statute of limitations. Your office must have a viable calendaring system in place. If you pass the date of the statute, your client's case is done and over with. The statute is blown, and malpractice has been committed.

I do not have enough room in this particular article to go into statutes. I refer you instead to *The Legal Professionals' Handbook*, written by members of LSI's Publications Revision Committee and published by The Rutter Group. I believe Chapter 2 of the first volume of books (there are currently two) deals with statutes. If you are unfamiliar with them, I urge you to read that chapter, as it is very distinct and goes into great detail. Check with your attorney if there are any questions and confirm the statute with that lawyer.

Assuming your client comes into the office prior to a few days of his or her statute running - and sometimes they do come in at the last se-

cond! - we usually start the ball rolling by notifying the insurance adjuster of our representation. Once our client's medical situation is stabilized, we order the medical records and billings themselves.

Before you order medical records and billings, the client will sign a HIPAA-compliant medical authorization. Sometimes, however, the provider may ask that their own authorization be signed and provided before they will release the client's medical records. Local area examples are UC Davis Medical Center and its affiliate offices; Sutter Medical Group; and Kaiser. If you must order a client's chart from a VA Hospital, they, too, have a unique authorization which must be signed by the client prior to the records being released.

The attorney determines when the demand package should be prepared and sent to the insurance carrier for evaluation. If the case cannot be resolved, litigation is commenced.

Follow your basic civil litigation rules. Your complaint is usually filed in the county in which the incident occurred, but sometimes, it is filed in the county where the defendant resides, the principal place of business of defendant corporation, or unincorporated association in its jurisdictional area, etc. Let your attorney determine proper venue.

Filing fees are now the same statewide. Do verify the amount of the fee with the Court, as they tend to change. If you must mail your pleadings out of county, many times, they will send their notices of case management conferences and other important local rule information when they return your endorsed complaints back to you. Be sure to always send a return envelope with enough postage when you send a document to the court for processing and filing - otherwise, you may never see it again!

In addition, with regard to recent changes we are experiencing with our own local courts here in Sacramento, you may have to wait for an extended period of time before you receive your endorsed-filed copies back. We have experience



Legal Procedures (cont.)

by Debbie Frias, CCLS

PERSONAL INJURY CASES FROM A LEGAL SECRETARIAL STANDPOINT

where one of my attorneys mailed a lawsuit in late August; we are still, as of the end of September, waiting for our endorsed copies! We have been informed that it may take six to seven weeks before we see our documents! Other counties are experiencing similar difficulties due to the budget constraints. Allow enough time for your documents to get to the court for filing and return to you.

When you send your documents out for service of process, be sure to also look in your local rules and note whether you must also serve a Statement of Damages or other document with your complaint. Years ago, I had experience with a case in Humboldt Superior Court where we were required to serve interrogatories at the same time we served our lawsuit. Likewise, I believe defendant had to do the same thing, and answer our interrogatories when they responded to our lawsuit.

Once your defendant has been served, calendar the last day for response. It is usually thirty days. Currently, we are allowed to give one fifteen-day extension to the other side to respond.

After the answer comes in, discovery begins - interrogatories and requests for production of documents are served, depositions are scheduled, etc.

The courts will guide you through much of the process. Thanks to case management conferences, we no longer have to file Memos to Set to let the courts know we are ready for our case to go to trial. Case Management Conferences will probably produce a ruling stating the case is scheduled for trial, or here in Sacramento, will refer us to the Court's trial setting process, now set a certain time down the road to give parties time to complete discovery.

In a nutshell, here are my suggestions:

- 1) Keep an accurate calendaring system and follow it closely;
- 2) Keep local rules on hand, or go on-line and check them out. If possible, keep a

copy of the local rules in your file. While some rules are the same throughout the state, there are some that are not uniform, and it never hurts to double-check them.

3) Be sure your form files are up to date. For example, medical release authorizations are governed under HIPAA. Facilities do not accept the old forms.

4) Document preparation is made easier by such programs as Martin Dean's Essential Forms.

5) If your office does not have volumes of The Legal Professionals' Handbook or The Law Office Procedures Manual - both books authored by LSI's Publications Revisions Committee - I encourage their purchase. These are continually updated by members of the PRC.

6) Join one or all of the sections of Legal Specialization Sections of LSI. Come to conferences and be prepared to learn! Attend your local association meetings! Attend the seminars! Believe me, you will be able to learn all about personal injury practice and a whole lot more!

I hope I have given you a basic rundown in this summary. Please understand this is from a plaintiff's firm's practice. Defense attorneys' staff may do things differently, but we all must be governed by the statutes, calendaring, and the court's local rules, etc.



LEGAL SPECIALIZATION SECTIONS Of LEGAL SECRETARIES, INCORPORATED

2012-2013 MEMBERSHIP APPLICATION/ANNUAL RENEWAL FORM

Complete and mail with your check made payable to LSI, for \$20 for each section, or a total fee of \$75 per year to join all SIX sections simultaneously if an LSI Member, or \$40 for each section, or a total fee of \$150 per year to join all sections simultaneously if joining as a non-LSI member.

Mail to: **Cheryl L. Kent, PLS, CCLS, Legal Specialization Sections Coordinator**
5534 Blackbird Drive, Pleasanton, CA 94566

Enclosed is payment of my dues for the fiscal year 8/1/12 through 7/31/13 for the following Section(s). Please check appropriate boxes below for the sections you are joining.

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Sacramento Legal Secretaries Association

Dinner Meeting - October 18, 2012



Vendor of the Month:

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Speakers:
Colette Bruggman
and
Darlene Warnock
of
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Topic:
"The ABCs of Filing a Writ of
Mandate"

5:30 – 6:15 p.m. Meet & Greet
6:15 – 8:00 p.m. Dinner Meeting
Courtyard Marriott – Midtown Sacramento
4422 Y Street, Sacramento
\$25 SLSA Members
\$28 Non-Members

RSVP by Tuesday, October 16. Checks should be made payable to SLSA, and mailed to Shelly Reyes, Registration/Reception Chair 2012-2013, c/o Law Office of Robert J. Binns, 3620 American River Drive, Suite 175, Sacramento, CA; fax: 916.487.6314. **NOTE: Cancellations must be received 48 hours in advance for a refund. No-Shows will be billed.**

MCLE & CCLS Credit: SLSA, a local association of Legal Secretaries, Inc., an approved provider, certifies that this activity has been approved for minimum Continuing Legal Education credit by the State Bar of California and California Certified Legal Secretary credit in the amount of **0.5 hours**.

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ENTRÉE SELECTION:

Boneless chicken breast
(with white wine reduction and lemon zest cous cous)

Penne pasta
(with tomato, Kalamata olives, artichoke hearts, and onions)

All meals served with spinach salad and dessert



Do you require an MCLE or CCLS certificate?

Are you an SLSA member? YES NO If "No", are you interested in membership? YES NO

Are you interested in hearing about SLSA volunteer opportunities? YES NO



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BIRTHDAY MAGIC!! SLSA'S OCTOBER CHARITABLE PROJECT



As many of you know, Birthday MAGIC is a program of the Volunteer Center of Sacramento that provides personalized birthday parties to children currently living in Sacramento area homeless shelters, transitional living facilities, or residential treatment centers.

The goal of Birthday MAGIC is to brighten the lives of children by providing fun, meaningful, and memorable birthday parties during what can be an awkward and challenging experience in their lives.

Each month, children living in these shelters will celebrate birthdays – through financial support, volunteer help, and the Birthday MAGIC program, these children will receive a birthday party thrown in their honor.

WHEN: Thursday, October 25, 2012, from 6:00 to 7:30 pm

**WHERE: Sacramento Area Emergency Housing Center's Family Shelter
Oak Park area, Sacramento**



SLSA's sponsorship guarantees the birthday cake, pizza, beverages, decorations, goodie bags, and entertainment.

WHAT WE NEED



- your help in purchasing presents for the kids
- donations of items to give as party favors to all the children at the center
- ideas for entertainment (approx. 30–45 minutes). It can be a quick craft project, magic show, game(s), etc.
- volunteers to help set up for the party, help celebrate and run the party, and then help clean up

It is recommended that each child receive 5 presents: 2 presents from their "Wants" list, 2 presents from their "Needs" list, and 1 "Surprise" present. Approximately 2 weeks prior to the party, we will be advised how many children will be having their birthday in October, and we will be given their birthday lists. We will then distribute the lists to our members to review and help purchase gifts.

If you are interested in joining us for the party, donating presents (or party supplies), or have any questions, please contact Crystal Rivera at crivera@somachlaw.com or (916) 469-3813. If you wish to volunteer at the party, you must **RSVP** Crystal Rivera; drop-ins are **not** welcome at the center.

Your Charitable Projects Committee THANKS YOU.

Crystal Rivera

Teri McClory

Corene Rodder

SLSA'S FALL CHARITABLE PROJECT



Sacramento Legal Secretaries Association is participating in Sacramento Food Bank & Family Services' (SFBFS) 19th Annual Spirit of Giving Drive.

Over the past 18 years, the Spirit of Giving (SOG) drive has helped SFBFS organization collect and distribute over 4.6 million pounds of canned and non-perishable food items to local families in need. Help SLSA support families in need by participating in this year's drive. The drive starts **October 1** and ends **January 31**.

Lynne Koroush and Greenberg Traurig have generously offered to host a container again this year. Last year SLSA collected 640 lbs.! This year we have the opportunity to surpass that amount. For members who wish to donate, you can bring your food donations to SLSA's regular meetings, and the Charitable Projects Committee will deliver the donations to SFBFS.

If you're unable to attend a regular meeting between now and the end of December and wish to donate food, please contact Teri McClory; it's possible that the Charitable Projects Committee can arrange to pick up and deliver your donations to SFBFS.

Thank you for your involvement. If you have any questions regarding this project, please contact Teri McClory at teretad@metzlawonline.com or (916) 716-9956.

Crystal Rivera, Chair crivera@somachlaw.com
Teri McClory, Co-Chair teretad@metzlawonline.com
Corene Rodder, Co-Chair rodderc@qtlaw.com



CCLS Terminology List

by *Launa Atkinson, CCLS*

Account	The form of record kept for each asset, liability, owner’s equity, revenue, and expense on the books of the firm.
Capital	The amount by which the assets of the business exceed its liabilities – also referred to as owner’s equity, proprietorship, or net worth.
Cash	Currency and coins and in a business, checks, drafts, and money orders.
Debit	The left side of an account.
Income Statement	Financial statement that measures a business’s performance for a stated or defined period of time.
Owner’s Equity	The amount by which the assets of the business exceed its liabilities.
Posting	Process of transferring amounts from a journal to the general ledger.
Credit	The right side of an account.
Journal entry	The first record of a business transaction.
Trial balance	Listing of the final balances of the general ledger accounts in chart-of-accounts number order.

CCLS Quiz Answers

CCLS QUIZ ANSWERS (from page 10):

ANSWERS—True or False

- | | |
|----------|-----------|
| 1. False | 6. True |
| 2. True | 7. True |
| 3. True | 8. True |
| 4. False | 9. True |
| 5. False | 10. False |





Desert Palm Legal Professionals Association Invites you to join us for A Weekend in Paris

November 16 -18, 2012
LSI 2nd Quarterly Conference
Palm Springs, CA

Conference Registration Form

Name (as it will appear on badge): _____
Mailing Address: _____
City/State/Zip: _____
Home Telephone: _____
Work Telephone: _____
E-mail Address: _____
Local Association (please spell out): _____ LSA/LPA

Please check if applicable and include title:

- State Officer _____
- State Chairman _____

Please check if you are:

- Governor CCLS PLS

SCRIP (includes Registration, Reception, Banquet and Brunch)
POSTMARKED BEFORE OCTOBER 15, 2012 \$114 \$ _____
POSTMARKED OCTOBER 16, 2012 OR LATER \$124 \$ _____

INDIVIDUAL TICKETS			
Registration by October 15, 2012	_____@	\$15.00	\$ _____
Registration after October 15, 2012	_____@	\$25.00	\$ _____
Welcome Reception (Friday)	_____@	\$20.00	\$ _____
Governor's Luncheon (Saturday)	_____@	\$23.00	\$ _____
President's Luncheon (Saturday)	_____@	\$23.00	\$ _____
Membership Luncheon (Saturday)	_____@	\$23.00	\$ _____
Banquet (Saturday Evening)	_____@	\$60.00	\$ _____
Brunch (Sunday)	_____@	\$22.00	\$ _____

TOTAL AMOUNT ENCLOSED \$ _____

Please indicate choice of: Sole Veronique Chicken Breast Dijonaise
 Beef Bourguignon Vegetarian

Special Dietary Restrictions: _____
Please make checks payable to: DPLPA Conference Fund

Mail to: Donna Ellis, Registration Chairman c/o Brian M. Lewis Law Office
44700 Village Court, Suite 100, Palm Desert, CA 92260

For Information, contact Conference Chair:
Jennifer Ellis (808) 542-4376 jennellis21@yahoo.com

NO REFUNDS UNTIL AFTER CONFERENCE



Conference

Desert Palm Legal Professionals Association Invites you to join us for A Weekend in Paris

November 16 -18, 2012
LSI 2nd Quarterly

Palm Springs, CA

HOTEL RESERVATIONS

Hilton Palm Springs
400 East Tahquitz Canyon Way
Palm Springs, CA 92262



ROOM RATES:

\$109 per night plus \$8 per day Resort Fee
Deadline for Group Rate is November 1, 2012

ROOM RESERVATIONS:

Call Hilton Reservations at (800) 445-8667 or call Hilton Palm Springs directly at (760) 320-6868
Online at www.hilton.com
Group Code: **LSI**

CHECK IN/OUT: PARKING:

Check in: 3:00pm Self Parking included in resort fee
Check out: 12:00pm Valet Parking is \$12 per day

AIRPORTS:

Palm Springs International Airport is 1.5 miles from Hilton Palm Springs
Ontario Airport is 65 miles from Hilton Palm Springs

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Contact Hotel at (760) 320-6868

FOR MORE INFORMATION:

Contact Jennifer Ellis at jennellis21@yahoo.com or (808) 542-4376



Lynne Koroush

September Vendor Spotlight: Compex Legal Services, Inc.

by Lynne Koroush

Compex Legal Services, Inc. (“Compex Legal”), founded in 1972, is a minority-owned company and an industry leader in litigation support services to law firms and insurance carriers. With over 300 professionals and 40 years of service to legal and insurance firms, they serve more than 500 insurance companies and 3,500 law firms from over 20 offices nationwide.

may have or assist if a particular location requires that a copy service come onsite to duplicate the files that you need.

Compex Legal is excited to announce the launching of its brand new website, which offers many features requested by its clients over the last ten years.

Thank you very much to Kelly Munson and Ashley Young for being at our September meeting and being SLSA’s Vendor of the Month!

For more information on Compex Legal, please contact:

Ashley Young, Account Manager
916-646-9028 ex. 316
Ashley.Young@compexlegal.com



Please remember to support our vendors, because they support us!!

~Lynne Koroush

Most of us probably recognize Compex Legal as the go-to source for subpoenas or records retrieval. However, Compex Legal offers three main lines of service:

- Document retrieval via subpoena & authorization;
- Deposition reporting; and
- TruSummary (Medical record summarization & reorganization).



Compex Legal also offers other services such as court filing and process serving in the Sacramento and surrounding areas. Additionally, they can assist with any large copy jobs that you



Lynne Koroush, Ashley Young, and Kelly Munson

Nationwide Services

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Please fill out this form to let us know the changes you would like to make to your membership record.

CHANGES IN MEMBER INFORMATION (PLEASE PRINT LEGIBLY):

NAME: _____
 FORMER NAME: _____
 NEW EMPLOYER: _____
 BUSINESS ADDRESS: _____
 CITY: _____
 STATE & ZIP: _____
 BUSINESS PHONE: _____
 FAX: _____
 BUSINESS E-MAIL: _____ (for vital updates/reminders)
 NEW HOME ADDRESS: _____
 CITY: _____
 STATE & ZIP: _____
 HOME E-MAIL: _____ (for vital updates/reminders)

CHANGE IN SPECIALTY:

- | | | |
|---|--|--|
| <input type="checkbox"/> Administrative Law | <input type="checkbox"/> Appellate Law | <input type="checkbox"/> Arbitration |
| <input type="checkbox"/> Business/Corporate Law | <input type="checkbox"/> Criminal Law | <input type="checkbox"/> Family Law |
| <input type="checkbox"/> Law Office Management | <input type="checkbox"/> Litigation | <input type="checkbox"/> Probate/Estate Planning |
| <input type="checkbox"/> Real Estate | <input type="checkbox"/> Taxation | <input type="checkbox"/> Other: _____ |

CHANGES TO MAILING/LISTING INFORMATION:

Where do you want *The Legal Eagle* and other SLSA/LSI mail delivered? Business Home
 Where do you want e-mail delivered? Business Home
 Which address should be listed in the membership roster? Business Home
 If you do NOT want to be listed in the membership roster, check here: No roster listing

Please submit to:
Lynne Koroush
SLSA Vice President and Membership Chair 2012-2013
1201 K St., Ste. 1100
Sacramento, CA 95814
E-mail: vicepresident@slsa.org



*Maimie Chyinski
and Lisa Haddix*



*Shelly Reyes and
Deseree Gamayo*



New SLSA Members being inducted



*Debbie Frias,
CCLS*



*Maimie Chyinski
and Dawn
Forgeur, CCLS*

September Regular Meeting Speaker Spotlight: William Muñoz of Murphy Pearson Bradley & Feeney

by Jennifer Rotz and Jennifer Sachs

During the September Dinner Meeting, the members of Sacramento LSA enjoyed an informative, inspiring, and humorous presentation about Ethics, Confidentiality, and Avoiding Malpractice. The topic was presented by William Muñoz, Managing Shareholder of Murphy Pearson Bradley & Feeney. Mr. Muñoz is a certified specialist in Legal Malpractice Law by the California State Board of Specialization. He practices law in state and federal court and focuses primarily on professional defense of attorneys, real estate agents/brokers, real estate appraisers, and insurance brokers.

Mr. Muñoz began his presentation by outlining how he views the role of a legal secretary. He emphasized the importance of a legal secretary and how they are the last line of defense against malpractice. He noted that a legal secretary should always double check to make sure correspondence leaving the office is addressed properly, faxes are sent to the correct person, and crucial calendar deadlines are met. He emphasized three very important items legal secretaries should avoid: (1) providing legal advice, (2) offering opinions about the merits of the case, and (3) making judgment calls while preparing legal documents. If faced with any of these situations, it is important to always defer to the attorney. It is important for both legal secretaries and paralegals to maintain abundant records on the cases and clients they work with for future conflict check purposes.

Mr. Muñoz concluded his presentation by discussing legal and professional ethics. He noted that paralegals are subject to Business and Professions Code section 6450, et seq. He reminded us that although legal secretaries are not subject to the Rules of Professional Conduct, both legal secretaries and paralegals have a duty to avoid the unauthorized practice of law and

have a duty of confidentiality. Ultimately, attorneys are liable for their legal secretary or paralegal's negligence, misconduct, or violation of ethics rules, including Business and Professions Code section 6450, et seq. It is essential for paralegals, legal secretaries, and other staff to know and follow the ethics rules. A legal professional's job is on the line and attention to detail is critical.

SLSA appreciates and thanks Mr. Muñoz for taking time to speak with us.



William Muñoz and Dawn Forgeur, CCLS



Jennifer Rotz, William Muñoz, and Jennifer Sachs

*Anne French*

September Lunch Lesson: Citations Part 2: Blue Book

by *Anne French*

On September 13, 2012, we had our second half of the Citations Lunch Lesson on the Blue Book. We almost had a sold out class for this session. Rebecca Anderson Smith, Esq. from Downey Brand LLP was the speaker and did a fabulous job on clarifying the Blue Book. There was a lot of information to take in but Rebecca did a wonderful job of laying out the information in a clear and concise format that can easily be used as a reference guide. I received a lot of positive feedback on the class from those who attended. Thank you to everyone who was able to take the time from their work day to attend. I am hoping that these lunch lessons are on a little more advanced level for everyone. Although many of you may not have to deal with the topics we are offering in your daily practice, I would still strongly encourage you to attend these classes. Having the

knowledge of other areas of law that you may not need presently, may help you in the future on a matter that happens to cross your desk or in the unfortunate event you may need to find employment in another area of law. Hopefully, these lunch lessons will help you to at least have a reference on how to stumble your way through an area of law that you may not be familiar with or be used as a reference in your present employment. Our next lunch lesson will be in November on the unlawful detainer process. As a reminder, please sign up as soon as possible for these lunch lessons. The quickest way to secure your spot is to e-mail me your registration form so that I can add you to the registration list. Our last two sessions have filled up quite quickly.

*Attendees at the lunch lesson*



*Rebecca Anderson Smith
and Anne French*



*Dawn Forgeur, CCLS
and Lynne Koroush*



Mary Taylor-Higgins and Cindy Biscarra

Sacramento Legal Secretaries Association

LUNCH LESSON



Date: November 6, 2012
Time: 12-1 p.m.
Location: Downey Brand LLP
 621 Capitol Mall, 18th Floor
 Sacramento, CA 95814
Cost: \$15 LSI Members
 \$17 Non-LSI Members
 NO REFUNDS

*Handouts only: \$5
 Lunch will be provided. Public parking
 is available in the building for a fee.*

Working Your Way Through an Unlawful Detainer

Speaker: *Adrian Webber, Esq.*
Downey Brand LLP

Name: _____
 Firm: _____
 Mailing Address: _____
 Daytime Phone: _____
 Email: _____
 Are you an SLSA member? Yes No
 Are you a member of another LSI association:
 If yes, which association? _____
 Check Here If You Would Like Membership Information:
 Do you require an MCLE or CCLS certificate?

Make Checks Payable to: SLSA
 Reservation due by October 31, 2012
 To: Anne French
 Downey Brand LLP
 621 Capitol Mall, 18th Floor
 Sacramento, CA 95814
 Tel: 916-520-5268/Fax: 916-520-5668
 Email: afrench@downeybrand.com

MCLE & CCLS Credit: SLSA, a local association of Legal Secretaries, Incorporated, an approved provider, certifies that this activity has been approved for minimum continuing legal education credit by the State Bar of California in the amount of **0.75 hours**.



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Nancy Vanderhorst, CCLS	October 1	Molly Mahoney	October 24
Launa Atkinson, CCLS	October 4	Diane Walters	October 26
Lori McCleerey	October 4	Erica Dillard	October 28
Jennifer Chastain	October 5	Donna Anderson	October 29
Astrid Watterson, CCLS	October 9	Jennifer Sachs	October 29
Lisa Haddix	October 13	Jennifer Estabrook, CCLS	October 30
Dimple Kohli	October 15	Maria Reyes	October 30
Tina Gravel	October 22	Sally Brooks	October 31

California Certified Legal Secretary

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APPLICATION

Please complete and mail this form to the following address with your check to reserve your place at one of the examination venues:

**CCLS Certifying Board
24740 Oro Valley Road
Auburn, CA 95602**

<input type="checkbox"/> Northern California	<input type="checkbox"/> Saturday, October 20, 2012
<input type="checkbox"/> Southern California	<input type="checkbox"/> Saturday, March 16, 2013

Deadline: Application must be received 60 days prior to examination date. A late application *may* be accepted up to 30 days prior to the examination if submitted with a \$30 late fee, in addition to the fees listed below, *if space is available*.

EXAMINATION FEES*			
LSI MEMBERS**		Non-LSI MEMBERS	
Registration fee:	\$ 25.00	Registration fee:	\$ 75.00
Examination fee:	\$ 100.00	Examination fee:	\$ 100.00
Total	\$125.00	Total	\$175.00

Enclosed is a check in the sum of \$ _____ ***, payable to LSI.

* Fees subject to change without notice.

** LSI members: Name of local association: _____ LSA/LPA.
Please enclose a photocopy of your local membership card.
You must be a member upon application to be eligible for reduced fees.

*** Include \$30 late fee if applicable.

Name _____ Last 4 Digits of SSN _____

Mailing Address: _____

City/State/Zip: _____

Day Phone: _____ Evening Phone: _____

E-mail(s): _____

Highest level of formal education completed: _____; Highest Degree: _____.

EMPLOYMENT RECORD: Please list legal secretarial employment, beginning with your most recent (or current) employment, to show a minimum of two full years of such employment. Attach a supplemental page if additional entries are necessary to show two full years of employment as a legal secretary.

Dates _____ Position _____

Employer _____

Address _____

City/State/Zip _____

Supervisor _____ Phone _____

Summary of Duties _____

Dates _____ Position _____

Employer _____

Address _____

City/State/Zip _____

Supervisor _____ Phone _____

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 are not to be discussed. I understand that my employment record will be verified by a member of the California Certified Legal Secretary Certifying Board.

Signature of Applicant _____ Date _____

BENEFITS

LEGAL SECRETARIES INCORPORATED (LSI)

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>DISCOUNT THROUGH CEB</p> <p>Members of Legal Secretaries, Incorporated are offered a reduced cost for certain educational benefits (seminars, publications) through Continuing Education of the Bar. For more information, visit http://ceb.com/LSI/</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, lsiorg@suddenlink.com, or LSI Vice President</p>
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<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), mikay@dwassociates.com Offering Investments, Retirement Plans, Education Savings Accounts, Medical Insurance, Life Insurance, Disability Insurance, and Long Term Care Insurance.</p>	<p>MWG FINANCIAL AND INSURANCE SERVICES Jory Wolf, President/Founder 6333 Greenwich Drive, Suite 210 San Diego, CA 92122 Office: (858)888-7300 Cell: (510)919-9062 jory@mwgfinancial.com California Insurance License: 0E88330 Individual disability insurance solutions</p>
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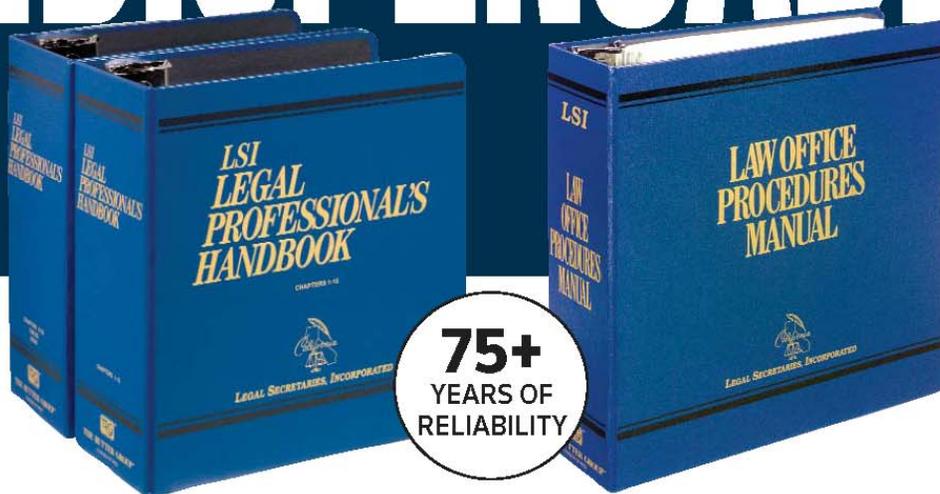
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LSI Marketing Committee Coordinator
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marybeau@comcast.net

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44	Beverly Hills/Century City	LSA	6		37	43
19	Butte County	LPA			12	12
17	Capitol City	LPA	1		7	8
7	Conejo Valley	LPA	5		6	11
21	Desert Palm	LPA	5		19	24
21	El Dorado County	LPA			11	11
45	Fresno County	LPA	15		25	40
40	Humboldt County	LPA	3		30	33
40	Imperial County	LPA	4		19	23
27	Livermore-Amador Valley	LPA	4		23	27
72	Long Beach	LSA	7		51	58
43	Los Angeles	LSA	6		36	42
17	Marin County	LPA	5		15	20
44	Merced County	LPA			39	39
5	Monterey County	LSA				0
73	Mt. Diablo	LPA	5		52	57
13	Napa County	LSA			12	12
94	Orange County	LSA	11		51	62
14	Palo Alto	LSA				0
20	Placer County	LPA	1		16	17
9	Redding	LPA			4	4
21	Rio Hondo District	LPA	3		13	16
21	Riverside	LPA	2		18	20
164	Sacramento	LSA	44		91	135
211	San Diego	LSA	37		148	185
65	San Fernando Valley	LSA	11		39	50
46	San Francisco	LPA	7		25	32
33	San Gabriel Valley	LSA	11		22	33
68	San Mateo County	LSA	9		46	55
26	Santa Barbara	LSA	3		20	23
81	Santa Clara County	LSA	23		50	73
7	Santa Cruz County	LPA	1		7	8
12	Santa Maria	LPA	1		8	9
35	Sonoma County	LSA	9		31	40
12	Southern Butte	LSA			11	11
41	Stanislaus County	LPA			32	32
48	Stockton-San Joaquin	LPA			33	33
4	Trinity County	LSA			4	4
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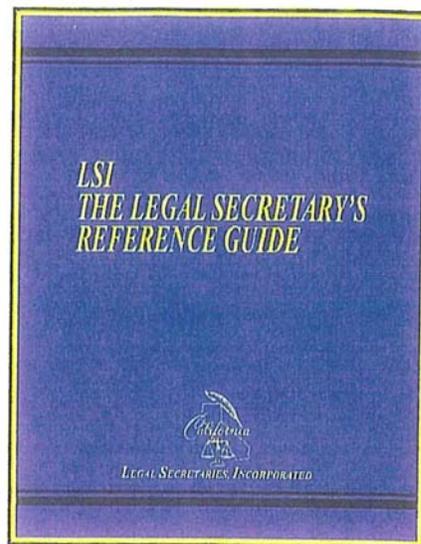
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2012-2013



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vicepresident@slsa.org



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parliamentarian@slsa.org

Editor's Note

by Liz Gideon, CCLS

The Legal Eagle welcomes letters and article suggestions from readers. Please send them to: Liz Gideon, CCLS, c/o weintraub | tobin, 400 Capitol Mall, 11th Floor, Sacramento, CA 95814 or lgideon@weintraub.com.

The Sacramento Legal Secretaries Association reserves the right to edit articles and letters sent in for publication. The deadline for all submittals is

the Monday after the general meeting of the month preceding the month of publication. This publication is designed to provide accurate and authoritative information in regard to the subject matter covered. It is distributed with the understanding that the publisher is not engaged in rendering legal, accounting, or other professional services. If legal advice or other expert assistance is required, the service of a com-

petent, professional person should be sought.

The opinions expressed in the articles published herein are those of the individuals submitting the articles and not necessarily the views of the board or editorial staff. This publication may not be reproduced in whole or in part without the express written consent of the board of the Sacramento Legal Secretaries Association.

"Do not follow where the path may lead. Go instead where there is no path and leave a trail."
~ Harold R. McAlindon

Code of Ethics

Legal Secretaries, Incorporated

It shall be the duty of each Member of the Legal Secretaries, Incorporated to observe all laws, rules, and regulations now and hereafter in effect relating to confidentiality and privileged communication, acting with loyalty, integrity, competence, and diplomacy, in accordance with the highest standards of professional conduct.

Dedicated to Joan Moore, PLS



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