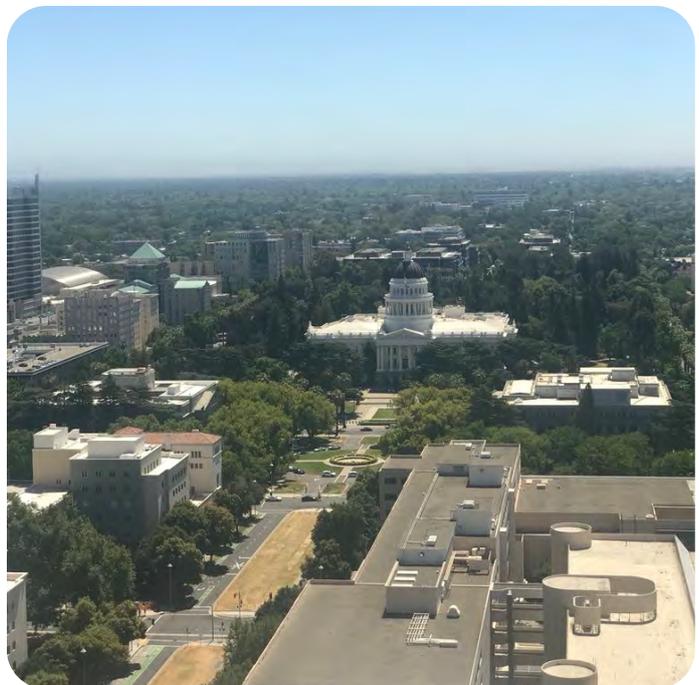


The Legal Eagle

Contents

- 3 President's Message
- 5 Governor's Report
- 7 Member News
- 7 Ways & Means
- 8 Save the Dates
- 10 Parliamentarian's Corner
- 11 August Conference Flyer
- 13 June Dinner Meeting Recap
- 15 June Vendor of the Month
- 17 Law Office Products & Management
- 20 California Certified Legal Secretary
- 23 Legal Procedures/Court Updates
- 28 SLSA Committee Members
- 29 SLSA Executive Board



Current and Upcoming Events



SLSA Executive Board Meeting



Legal Specialization Sections Webinar
Register by July 19



SLSA Dinner Meeting
LD to register w/no late charge: July 15



SLSA Executive Board Meeting



LSI Online Class re Overview of State
Court Discovery Class. Register by July 16



SLSA Dinner Meeting
LD to register w/no late charge: August 12

REACH RECORD HEIGHTS

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

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DATA INTELLIGENCE

President's Message

By: Brenda Bracy, CCLS

Our membership is growing. I want to thank all of the members who have sent in their renewals on time. I am also pleased that we have some new members that we will be inducting over the next couple of months. I look forward to getting to know everyone this year.

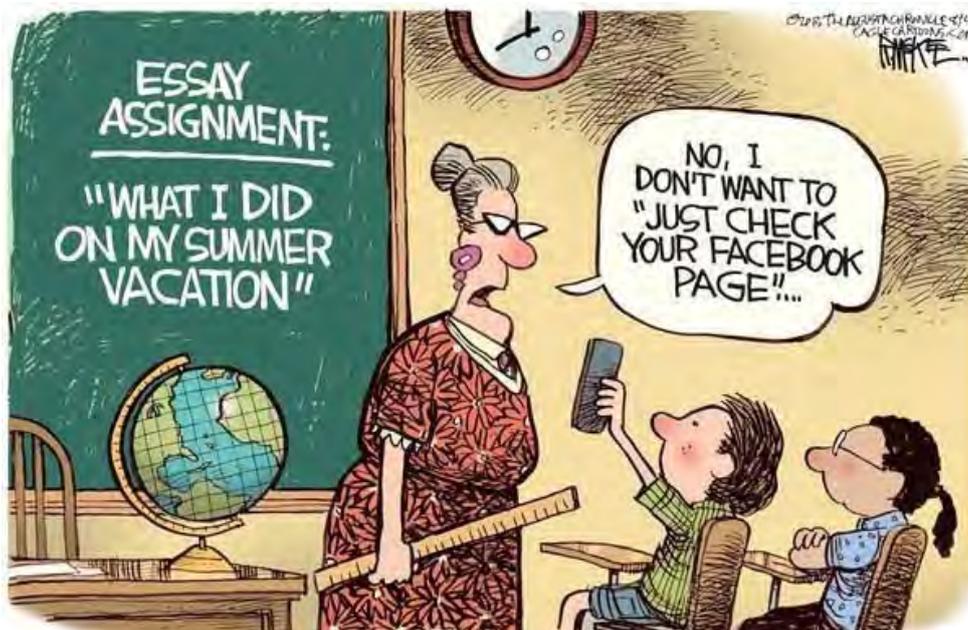
I am looking forward to having a fun filled year with all of you. We are planning various events and will have flyers available soon, so stay tuned. Come out and support these events and get to know other members. I promise you will not regret it. This is a great group of people and our vendors not only participate, but attend our events as well, are great people as well. Our organization does a lot of community and charity events that I am proud to be a part of.

Summers are kind of lazy for most of us as the kids are out of school. Many of you schedule summer vacations to take families to places to get out of the rat race of our everyday lives and enjoy down time. I hope all of you get to enjoy fabulous vacations this summer with your families and get away for some quality down time. Our jobs are stressful and getting time to relax and destress makes it easier for us to do what we do. Take photographs while on those vacations and submit them along with a short story to our Bulletin Editor, Dawn Forgeur, CCLS (dawn.forgeur@stoel.com). We are always looking for new articles for the Bulletin. It would be fun to hear from our members about all the fabulous adventures that everyone had this summer.

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

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

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



Sacramento Legal Secretaries Association



Dinner Meeting • July 19, 2018

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

**The Old Spaghetti Factory
1910 J Street, Sacramento**

5:30 – 6:15 p.m. Meet & Greet
6:15 – 8:00 p.m. Dinner Meeting



California E-Filing Landscape

*Guest Speakers:
Larry Kirlin and Jim Pinter
First Legal*



MCLE & CCLS Credit: Sacramento Legal Secretaries Association is a local association of Legal Secretaries, Incorporated, an approved provider, and certifies that this activity has been approved for minimum continuing legal education credit in the amount of **1.0 hour** by the State Bar of California.

RSVP by Midnight on Sunday, July 15*

Two Ways to Register:

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

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

Make checks payable to “SLSA” and mail to:

Corene Rodder
Registration/Reception Chair 2018-2019
c/o Somach Simmons & Dunn
500 Capitol Mall, Suite 1000
Sacramento, CA 95814

Dinner Menu – Choice of:

- Spaghetti with Meat Sauce
- Fettucine Alfredo
- Meat Lover’s Treat (Meatballs & Sausage)

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



Thank You to Our Vendor Partner for July!

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

Governor's Report

By: Jan Ainsworth

Hello all, this report will be short and sweet. I trust you were able to digest all of my report in the June bulletin regarding the LSI business that took place at LSI's 84th Annual Conference held in May at The Garland in North Hollywood. I also hope that you enjoyed seeing the photographs and reading the reports of your delegates – a good time was had by all. You too may participate in the education and festivities at LSI's First Quarterly Conference, August 17-19, 2018, at the Stockton Hilton hosted by Stockton-San Joaquin County LPA. Look for the fliers in this bulletin.

As you know, SLSA's Chapter Achievement Program for fiscal year 2018-2019 began April 1, 2018, so send me your submittal. **CAPS to date: 5550 points**

Upcoming Conferences:

LSI First Quarterly Conference – August 17-19, 2018, at the Stockton Hilton hosted by Stockton San Joaquin County LPA

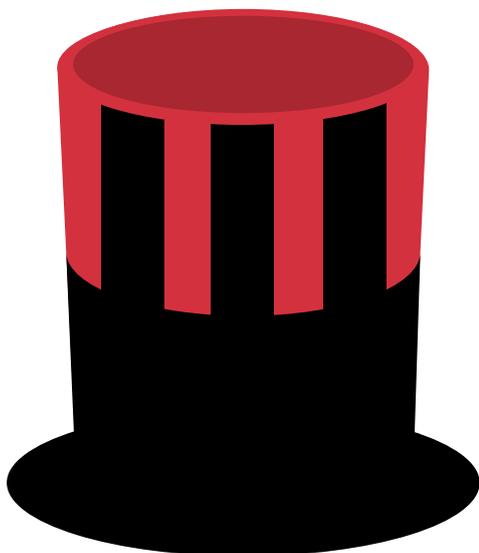
LSI Second Quarterly Conference – November 9-11, 2018, at the Silver Legacy Hotel & Casino, Reno, NV, hosted by Santa Clara County LPA

You read the delegate reports from annual conference, you saw the pictures, here is your chance to come out to two conferences within an easy driving distance!

LSI Third Quarterly Conference – February 15-19, 2019, at the Viejas Hotel & Resort, Alpine, hosted by San Diego County LSA

LSI 85th Annual Conference – May 15-19, 2019, at the DoubleTree by Hilton, Newark, hosted by Alameda County LSA

Mark your calendars and come on out.



Editor's Note

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

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

Chapter Achievement Reporting Form

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

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

Date of Event Event

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

Name: _____ Email: _____

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

Member News

By: Crystal Rivera

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

ACTIVE MEMBERSHIP

Jennifer Adame – Jennifer is a legal secretary at the California Department of Human Resources, and has been employed as a legal professional since 2001. She specializes in administrative and criminal law, and litigation. She celebrates her birthday on April 5.

Rachel Victoria Jaimes – Rachel is a legal assistant at Broadridge Financial Solutions, Inc., and has been employed as a legal professional since 2000. She specializes in business/corporate and criminal law, litigation, personal injury, and clinical negligence. She celebrates her birthday on May 16.

Shareen Khan – Shareen is a legal secretary at Wilke, Fleury, Hoffelt, Gould & Birney LLP, and has been employed as a legal professional since 1998. She specializes in arbitration, business/corporate law, and litigation. She celebrates her birthday on December 7.

April Sones – April is a legal administrator at Perkovich Law Offices, and has been employed as a legal professional since 2011. She specializes in family law. She celebrates her birthday on July 24.

Happy July Birthdays!



- Luz Loree - July 7
- Brenda Bracy, CCLS - July 10
- Angela Kolak - July 13
- Heather Rodriguez, CCLS - July 15
- Morgan Albanese - July 22
- Pamela Lee, CCLS - July 22
- Maryanna Rickner - July 22
- Noreen Patrignani - July 24
- April Sones - July 24
- Richard Cea - July 25
- Jessica Anderson - July 27
- Christie Kaelber - July 28

TACOS
& RAFFLE
PRIZES

SAVE THE DATE!

BUNCO!

SACRAMENTO LSA



AUG 25
TIME TBD

VOLUNTEERS AND RAFFLE PRIZES
NEEDED!

PLEASE CONTACT CRYSTAL RIVERA IF YOU CAN
HELP! CRIVERA@SOMACHLAW.COM



SAVE THE DATE! **SLSA RENO BUS TRIP**

Sponsored by

Sacramento Legal Secretaries Association

Saturday, October 6, 2018
7 AM to 7 PM

Destination: **The Silver Legacy Resort Casino**



Stay tuned! Details to follow!

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

We will have two convenient pick up locations:

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

Questions???

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

BUNCO

SAVE THE DATE

Hosted by Placer County LPA

October 20, 2018

Parliamentarian's Corner

By: Astrid Furstner, CCLS, OCP

Rules – Bylaws – What are they?

Ah, the rules. It could be said that rules are the box that surround you. They provide for the proverbial line that one should not or cannot cross. In SLSA, we are governed by our Bylaws and Standing Rules. Robert's Rules defines bylaws as a document that contains the highest level of rules of the organization. The bylaws contain the group's own basic rules relating principally to itself as an organization. Those rules (bylaws) generally describe what the group's purpose is, what the qualifications and methods are for selecting members, who and how officers and committees are selected, when meetings are held, and generally how the organization will be run. Bylaws should include provisions for their own amendment that require previous notice of proposed amendments. As the years go by and technology along with the law changes, so too must organizations adapt to change. SLSA's bylaws were made years ago and there are certain things that may or may not work for the organization anymore. However, in order to update the bylaws, the members have to agree that a change is in order. Currently, there are a few rules that may not be useful anymore or may require updating. You will soon see a few of those proposed amendments to the bylaws be distributed to all members in order to decide if they should indeed be updated. I hope that when the time comes, each member is able and willing to participate.

Until next time ...



DID YOU KNOW?

That SLSA's website has free employment listings available for employers to post job openings? Contact the SLSA Employment Chair for more information!
www.slsa.org/employment/

STOCKTON-SAN JOAQUIN COUNTY LEGAL PROFESSIONALS ASSOCIATION
 INVITES YOU ALONG FOR A
California Road Trip!
LSI 1ST QUARTERLY CONFERENCE
AUGUST 17-19, 2018

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

CONFERENCE REGISTRATION FORM



Name (as it will appear on badge): _____
 Mailing Address: _____
 City/State/Zip: _____
 Home/Cell Telephone: _____
 Work Telephone: _____
 Email address: _____
 Local Association (please spell out): _____

PLEASE INDICATE IF YOU ARE:
 _____ State Officer
 _____ State Chairman
 _____ Governor
 _____ CCLS _____ PLS

SCRIP (includes Registration, Welcome Reception, Banquet and Brunch):
 POSTMARKED ON OR BEFORE JULY 20, 2018 \$ 125.00 \$ _____
 POSTMARKED AFTER JULY 20, 2018 \$ 135.00 \$ _____

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

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

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

_____ BANQUET (Saturday Evening) \$ 60.00 \$ _____
 CHOOSE ONE: _____ Rib Eye Steak _____ Chicken _____ Vegetable Napoleon

_____ BRUNCH (Sunday) \$ 30.00 \$ _____
 TOTAL AMOUNT ENCLOSED \$ _____

Special Dietary Restrictions _____

PLEASE MAKE CHECKS PAYABLE TO SSSJCLPA AUGUST CONFERENCE
RETURN THIS FORM WITH PAYMENT TO REGISTRATION CHAIR:
Jan Kuykendall, 11662 N. Ham Lane, # 41, Lodi, CA 95242;

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

August 18, 2018

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



11:00AM - 12:00PM

Probate and Estate Planning

Estate Planning 101

Jeffrey E. Prag
Law Offices of Jeffrey E. Prag

Law Office Administration

Government Claims - Do's and Don'ts:

A Look Into the Gov. Code
Charles Torretta, SCLA, MCSA
George Hills Company, Inc.

3:00PM - 4:00PM

Federal Law

Cannabis: State Laws v. Federal Laws

Stephen Munkelt, Esq.
Munkelt Law Office

Criminal and Family Law

Recent Criminal Law Developments

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

4:30PM - 5:30PM

Specialty Law

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

Patricia A. Wenthe
Legal Document Assistant

Civil Litigation

Subrogation

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

REGISTER ONLINE AT WWW.LSI.ORG

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

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

June Dinner Meeting

By: Brenda Bracy, CCLS



Brenda Bracy, CCLS and Officer Pamela Zamarripa

SLSA's guest speaker for the June 21, 2018, dinner meeting was my beautiful daughter Officer Pamela Zamarripa of the Sacramento Police Department. Ms. Zamarripa spoke on Workplace Violence. This is a hot topic which is kind of sad.

Officer Zamarripa gave us a few scenarios which included a few of the school shootings from the past, as well as shootings that have occurred at businesses. She walked us through the school shootings first. The first known school shooting, the Columbine shooting, the shooters knew the layout of the school, and had planned the shooting for some time before executing it. The same is true with many of the other school shootings that have followed since. Many schools now have police officers on campus in an attempt to avoid these shootings.

Unfortunately, the recent school shootings had officers on campus, but still happened anyway. However, two recent school shootings at the end of this school year were stopped without casualties by having police officers on campus that were able to apprehend the shooter before they were able to shoot any students or staff.

Officer Zamarripa also told us how we should always utilize whatever is in the room in order to protect ourselves in case of an active shooting. For instance, at the restaurant, if a lone gunman were to enter, with a room full of people, we could all run towards him, and throw chairs, knives, and other items in the room at him. He might get a few rounds off, but he would not be able to shoot everyone. Chances were good that he could be taken down by a big group, and you had a better chance of survival than just sitting still and not doing anything at all. Also, in an active shooting situation, you should never try to get your personal items, and never just freeze and stand still and do nothing.

Another problem in society these days is domestic violence, which can also happen in the work place. We were told that 40% of work place shootings are done by a person who has a grudge against an employee that works there. For instance, the recent New York shooting was the result of a husband whose wife had served him with divorce papers. He came to her place of employment with a gun, but even though she was not at work, he still shot multiple employees before he was apprehended. A key element to survival in today's society is paying attention. If you hear an employee complain about a domestic violence problem, you should report it to your supervisor. Everyone is at risk, so it should not be kept quiet. If a spouse threatens to harm his or her spouse, it could present a problem to the rest of the office and should be reported.

Another scenario that was talked about was the shooting that happened in San Bernardino. This was a husband and wife team, in which the husband was an employee. He knew the layout, and knew everyone would be in a meeting and walked right in. People knew him so they didn't think anything was wrong. He walked in and shot people before they knew what was happening, and most people just sat there and froze. This is common in work place shootings. It is important to be active in trying to run, hide, and most importantly, leave your personal belongings. In these types of shootings, people try to run to get their personal belongings and get shot in the process. This is not a good idea. You have to run to get away, hide, and be in survival mode. In this scenario, attacking the shooters who had assault rifles probably would not have worked, but running away in mass, would have given you at least a chance. We were also told to run into an office where you could lock the door and hide.

June Dinner Meeting - Photos



Terri Olson, Debra Clark, Serena Pena



Pamela Lee, CCLS, Rachel Jaimes, Launa Atkinson, CCLS



Kelly Leca, Heather Rodriguez, CCLS, Lacy Monserrat, CCLS



Kathie Courtland, Dawn Willis, Stephanie Crowe



Shareen Khan, Jennifer Estabrook, CCLS



Jan Ainsworth, Susan Martin



Casie Campbell, Daphne Boyd



Corene Rodder

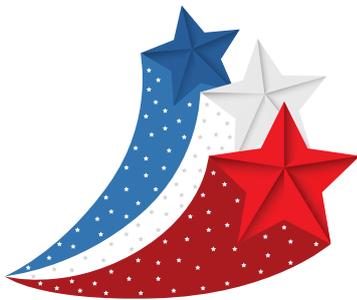


Lori Gilmette, Marci Frazier

June Vendor of the Month



The Vendor of the Month for June was Ignacio Solorio of [95814 Digital](#). Recently relocated to 808 R Street, Suite 207, 95814 Digital is a State of California certified small business, offering fair competitive prices with flexible terms since 1999. Their niche is handling and processing electronic discovery documents. They also specialize in litigation copying and high volume digital color printing. 95814 Digital is regarded as a preferred vendor for many in the Sacramento legal community due to their attention to detail and years of legal experience. Their team would love to meet with you regarding an upcoming project or provide you with more information regarding their services - [95814 Digital at \(916\) 444-1414](#).



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

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916.444.1414

808 R Street, Suite 207
Sacramento, CA 95811

Legal Specialization Sections Lunch & Learn Webinar
Environmental Law & CEQA
 Presented By: **Stefanie Warren, Esq.**



August 2, 2018, 12-1 pm

ONLINE REGISTRATION AND PAYMENT AVAILABLE AT WWW.LSI.ORG

| | | |
|---|--|--|
| <p>All Legal Specialization Section Members</p> <p>Free with Advanced Registration Registration is \$5 after July 19, 2018</p> <p><input type="checkbox"/></p> | <p>LSI / Local Association Member</p> <p>\$10 with Advanced Registration Registration is \$15 after July 19, 2018</p> <p><input type="checkbox"/></p> | <p>Non-LSI Member or Attorney</p> <p>\$15 with Advanced Registration Registration is \$20 after July 19, 2018</p> <p><input type="checkbox"/></p> |
|---|--|--|

REGISTRATION WILL CLOSE ON JULY 26, 2018.

Name: _____ E-mail: _____

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

Questions for the Speaker: _____

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

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

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



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

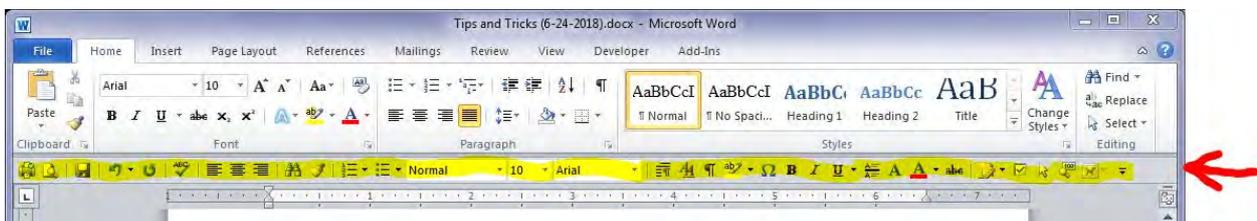
Law Office Products & Management

By: Gisele Mitsuk

QAT QAT! It's not a duck, but it's the "Quick Access Toolbar" and it's here to save you time! If you are like me, you may have been using Microsoft Word for 10-20 or more years. After all, "Word" debuted in 1989. However, most law firms were quite fond of Corel's WordPerfect and took years to embrace what our clients wanted – Microsoft Word file format for document review. Like the change from WordPerfect to Word, progressing from Word 2003 to Word 2006 was frustrating to embrace as we had to learn how to accomplish our word processing work with a new interface that switched from a menu-based layout to a more "picture-oriented" layout with "ribbons" and a "quick access toolbar." While the legal industry has typically been slow to adopt new software, most of us have probably had QAT in our lives for more than 10 years. Yet, I still see some secretaries not maximizing their QAT. I hope these QAT tips can help you save you some precious time at your computer. And if your QAT is already personalized, perhaps I can show you one new trick!

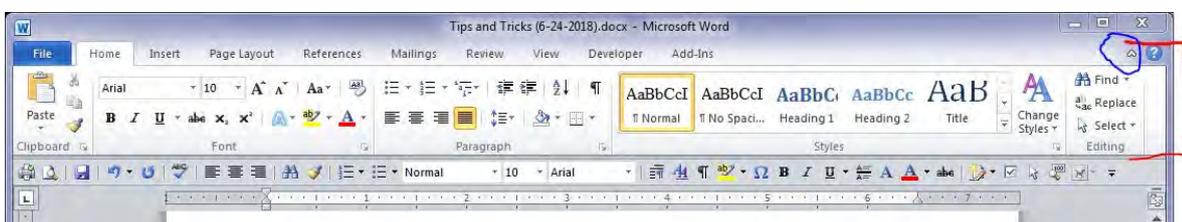
What is the QAT?

The quick access toolbar (QAT), is what you find under (or above) your ribbon and holds your favorite commands. (See the yellow high-lighted area and arrows below)



What is the ribbon?

The ribbon is the set of toolbars at the top of all Microsoft Office programs. Mine are the default selections of File, Home, Insert, Page Layout, References, Mailings, Review, View, and Add-Ins. I've added "Developer" to mine as well. It replaced the word-based menus of Word 2003 and earlier versions. (See the red bracketed area below and note the caret symbol in blue for later)

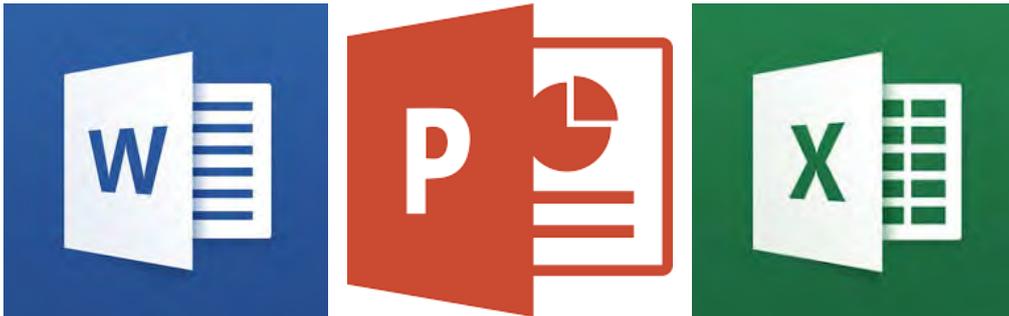


How do I personalize my ribbon?

One way that you can personalize your ribbon is by right-clicking on the open space on the QAT. This is just to the right of the down arrow below the "Editing" group on my screenshot above). Select "Customize the Ribbon." You can also hide the ribbon and make more of your document viewable by doing one of two things: (1) click the caret mentioned and shown in the screenshot above; or (2) select "Minimize the Ribbon" from the menu once you right click on the QAT.

I like to add the "Developer" tab for reasons I'll mention below.

Law Office Products & Management Cont.



How do I personalize my QAT?

One way that you can personalize your QAT is by right-clicking on the open space on the QAT. This is just to the right of the down arrow below the “Editing” group on my screenshot above). Select “Customize Quick Access Toolbar.” Here you can add buttons until your heart is content. Note that adding “Separators” between every 2 or more icons can help group your favorite commands for easier reference. You can also add multiple separators, if that helps you! My favorites include: quick print, format painter, left-center-right align, show/hide paragraph marks, symbols, insert horizontal line, strikethrough text, zoom document to 100% normal size, select objects, and checkbox content control! Which leads us to...

How do I insert a check box in my Word document?

Have you ever created a check list within word and tried figuring out how to create a check box to make it easier to manage online (or offline on a printed document)? If you already know how to do this, you are probably marveling with me at the level of difficulty in which Microsoft made it to insert this handy interactive symbol. Here are the steps:

- Remember the “Developer” tab I mentioned in the paragraph about the ribbon? Click on it.
- Within the “Controls” group you’ll find a check box with a check mark in it. When you hover over the icon/button, it’ll read “Check Box Content Control.”
- Right click on the Check Box Content Control icon/button.
- Select the first option “Add to Quick Access Toolbar.” From here you can go back to “Customize Quick Access Toolbar” step from above and move it to where you want it to belong.
- Now that the check box is where you want it in your QAT, you can go crazy adding check box anywhere you want. Anytime you are in the Word document which has one or more of these check boxes, you can left click the box one time and it’ll be marked. Click it again and the checked off box will revert to empty. You can also select the check box and change the size or color like you would with text.

Looking ahead... I’m open to your input as to what should be included in Law Office Products & Management in the next edition of **The Legal Eagle**. Let me know what you want to see!



SACRAMENTO COUNTY BAR FOUNDATION

TACO TUESDAY FUNDRAISER!

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



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



2 Drink Tickets Included
 - Beer, Wine & Margaritas!

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California Certified Legal Secretary

By: Elizabeth Madden, CCLS

LAW OFFICE ADMINISTRATION

1. Which of the following comes first alphabetically:
 [A] Ronald McKay
 [B] Samantha MacKay-Andrews
 [C] Terry MacKay
 [D] Walter Mackey
2. The form most frequently completed by a notary public is:
 [A] Jurat
 [B] Acknowledgment
 [C] Proof of Execution
 [D] Certification of Documents
3. In order to record information over existing information on a CD, use one that is labeled:
 [A] CD-ROM
 [B] CD-R
 [C] CD-RW
 [D] CD
4. Which of the following is not correct:
 [A] Dr. John Smith, DDS
 [B] John Smith, Ph.D., M.D.
 [C] John Smith, M.D., Ph.D.
 [D] Mr. John Smith, Attorney at Law
5. Which of the following are font types acceptable for court filings:
 [A] Arial, Times New Roman, Script
 [B] Courier, Garamond, Times New Roman
 [C] Arial, Courier, Times New Roman
 [D] Comic, Arial, Book Antiqua
6. A woman who wants to indicate her preference for Ms. should use the title in both her typed and handwritten signature.
 [A] True
 [B] False
7. The acronym DVD stands for "digital versatile disc."
 [A] True
 [B] False
8. The modified-block style has only the complimentary closing starting at center.
 [A] True
 [B] False
9. Only a notary public's seal must be kept in a locked and secure location.
 [A] True
 [B] False
10. The mail merge feature of a word processing program automatically creates an envelope from correspondence the user types.
 [A] True
 [B] False



| | |
|---------------|--|
| Abscond: | Hide or sneak away to avoid arrest, a lawsuit, or creditors |
| Acquiescence: | Silent agreement; knowing about an action or occurrence and remaining quietly satisfied about it, or appearing to be satisfied |
| Aforesaid: | Archaic term meaning something previously mentioned in the same document |
| Bona Fide: | In good faith; meeting all the requirements |
| Capricious: | Not based on fact, law, or reason |
| Conciliation: | The process of bringing together two sides to agree to a voluntary compromise |
| Deviation: | A departure from usual conduct, such as an employee's use of work time for personal business |
| Digest: | A summary of law or legal principles which condenses or explains the information |
| Ergo: | Therefore; consequently; hence |
| Onerous: | Unreasonably burdensome or one-sided |



LEGAL SECRETARIES, INCORPORATED
CALIFORNIA CERTIFIED LEGAL SECRETARY

WORKSHOP REGISTRATION FORM

“Legal Computations– Calendaring”

First Quarterly Conference
Stockton Hilton, Stockton, CA

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

PLEASE NOTE SPECIAL TIME FOR THIS CONFERENCE ONLY

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

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

REGISTRATION DEADLINE: August 14, 2018

Name: _____ Email: _____

Address/City/State: _____

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

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

CCLS CREDIT WILL BE GIVEN FOR THIS WORKSHOP



California Certified Legal Secretary
A Program of LSI®



APPLICATION TO TAKE CCLS® EXAM

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

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

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

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

Personal Information

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

Employment Information

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

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

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

Date: _____ Applicant Signature _____

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

Legal Procedures/Court Updates

Butte County Superior Court

Electronic filing will become Mandatory in the following case types effective 7/1/18:

**Juvenile Dependency matters (W&I 300)
Unlimited Civil matters**

Electronic Filing may only be performed using an authorized eFiling Service Provider (EFSP). Visit <http://www.odysseyefileca.com/service-providers.htm> for a list of available EFSPs. As each EFSP is an independent vendor, instructions for use of each site must be obtained from the corresponding provider. Please be aware that each EFSP will also establish their own fees and rules for use.

In addition to any fees charged by the EFSP, a \$5 per-transaction eFiling fee will be charged for each document electronically filed "envelope" (an envelope is a single eFiling submission on a particular case that may contain one or more documents). This eFiling fee is reduced to \$3.50 per envelope for envelopes submitted in case types where eFiling is Mandatory.

Parties paying Filing Fees by Credit Card will also be charged a processing fee that is a percentage of the overall transaction (filing fee per the Court's fee schedule plus \$5 eFiling fee or \$3.50 eFiling fee) to cover the cost of the credit card transaction.

Parties paying by eCheck will be also be charged a flat fee of \$.25 per transaction in lieu of the percentage-based credit card processing fee, plus the standard filing fee per the Court's fee schedule.

Pursuant to California Rule of Court 2.259(c), documents may be electronically transmitted to the court at any time of the day. Acceptance of documents for filing shall be deemed to occur on the date the document was submitted to the Court.

Yuba County Superior Court

Effective 7/1/18: Mandatory Electronic Filing and Service

Documents filed in all civil cases, probate cases, family law, and juvenile dependency cases must be filed and served electronically. Self-represented parties and non-parties are exempt from the mandatory electronic filing and service requirements, but are encouraged to participate voluntarily. An attorney representing a party may request to be excused from the mandatory electronic filing and service requirement by showing undue hardship or significant prejudice. An attorney requesting to be excused shall file with the Clerk of the Court and serve on all parties a Request for Exemption from Mandatory Electronic Filing and Service (Judicial Council Form EFS-007) with a Proposed Order (Judicial Council Form EFS-008). An attorney who files and serves a Request for Exemption from Mandatory Electronic Filing and Service shall be served with documents in paper form until the Court rules on the Request for Exemption. Undue hardship or significant prejudice does not include the inability to pay fees for electronic filing. Self-represented parties, non-parties, and attorneys excused from electronic filing must be served conventionally.

Electronic Filing Requirements

All documents electronically filed, whether mandatory, permissive, by court order, or by stipulation of parties, must be electronically filed with the court using one of the court's approved electronic filing service providers, and must comply with the court's electronic filing requirements. Electronic filing requirements, including a list of approved electronic filing service providers, are available on the court's website at www.yuba.courts.ca.gov and in hard copy at the clerk's office.

LEGAL SECRETARIES INCORPORATED (LSI) - BENEFITS

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

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

Revised 03/2017



OVERVIEW OF CALIFORNIA STATE COURT DISCOVERY



LSI will be offering an online class on an Overview of California State Court Discovery. This class will be a six-week, work-at-your-own-pace online session commencing July 23 and ending September 3, 2018. During the classes, the following topics will be covered:

- | | |
|------------------------------------|----------------------------------|
| Interrogatories | Demand for Physical Examinations |
| Demand for Production of Documents | Deposition Subpoenas |
| Requests for Admissions | Discovery Timelines and Service |
| Depositions | Verifications |

CLASS SESSION OPENS MONDAY, JULY 23, 2018

Classes will take place online utilizing video lectures, discussion boards, email, whiteboard sessions, chat rooms, and quizzes. Login information will be provided upon enrollment in the class.

The content of this class is designed for legal secretaries and those studying for the California Certified Legal Secretary examination.

The cost of the class is \$30 for LSI members/\$50 for non-LSI members. Each individual must register separately. Upon completion of the class, students will receive a certificate of completion from LSI.

OVERVIEW OF CALIFORNIA STATE COURT DISCOVERY CLASS REGISTRATION

Name: _____ Email: _____

Address: _____

City/Zip: _____ Telephone: _____

\$30 LSI Member _____ Association: _____ LSA/LPA
(No abbreviations please; status is verified)

\$50 Non-LSI Member _____

Payment: Check # _____ (made payable to LSI)

Name on Card: _____

Visa/MC Credit Card # _____

Exp. Date: _____ 3-digit CVV No.: _____ Zip Code: _____

Email registration form NO LATER THAN July 16, 2018, to training@lsi.org or mail to LSI, 2520 Venture Oaks Way, Suite 150, Sacramento, CA 95833. Registration will also be offered online at www.lsi.org with PayPal. For further information or inquiries, email training@lsi.org. No refunds after July 23, 2018. CCLS credit has been approved under Section 1e of the Standards for Recertification re self-study.

LSI – Educating California's Legal Professionals

PLACER COUNTY LEGAL PROFESSIONALS ASSOCIATION

**Dinner Meeting – August 14, 2018
5:30 – 6:00 p.m. Social & Dinner
6:00 – 8:00 p.m. General Meeting**

**Round Table Pizza
8755 Sierra College Blvd
Roseville, CA 95661**

**Speaker: Michael Bennett of MCB Estate Planning
“Everyone Else Is Doing It, So Why Can’t I”**



PCLPA, a local association of Legal Secretaries, Incorporated, an approved provider, certifies that this activity has been approved for minimum continuing education credit by the State Bar of California in the amount of 0.5 hours

**RSVP by Noon on Friday, August 10, 2018
(MONEY & RESERVATION DUE THIS DATE)**

Make checks payable to PCLPA and mail to:

Amy Visger
Registration Chair, PCLPA
c/o Cota Cole & Huber J.L.P.
2261 Lava Ridge Court
Roseville, CA 95661

Name: _____
Address: _____
City: _____ State: _____ Zip: _____
Email: _____
Telephone: _____
Member (\$12) _____ Non-Member (\$15) _____ MCLE Only (\$5) _____

Dinner Menu:

- Pizza
- Salad Bar
- Water

Sodas, Beer, and Wine available for purchase

***Cancellations must be received 24 hours in advance for a refund. No-shows will be billed.**

“Encouraging a Growing Environment Through Legal Education”

General Meeting August 2018.docx

San Francisco Legal Professionals Association



A Special Evening Educational Presentation
Tuesday, July 17, 2018



CRACKING THE CODE: Understanding The Court Rules Behind all the Legalese
 Presented by *Scott Herndon, Esq. and Francie L. Skaggs*

Tuesday, July 17, 2018
 6:00 p.m. to 8:30 p.m.
 San Francisco State Downtown Campus
 835 Market Street, San Francisco, CA 94103

As Legal Professionals, we are often asked to find out the rules that govern our filings and service of documents. But wait – we didn't go to law school – so how do we follow the rules behind all that legalese? How do we...crack the code?

This presentation will help legal secretaries, paralegals and other professional staff become an asset to their firm by helping understand the California Court Rules and Local Court Rules, as well as the structure of the rules.

SCHEDULE

| | |
|------------------------|------------------------|
| 6:00 p.m. to 6:30 p.m. | Registration and Pizza |
| 6:30 p.m. to 7:30 p.m. | Presentation |
| 7:30 p.m. to 8:30 p.m. | Crack the Code! |

\$30.00 for Members
 \$35.00 for Non-Members¹

To Register go to <https://www.sflpa.org/> and click on the "Events" page to go to the event and register; or email Francie Skaggs – francieskaggs@gmail.com – by Friday, July 13, 2018.

One Hour of MCLE Credit & CCLS Continuous Education Certificates Available. This event is open to anyone in the legal industry. Feel free to share with your colleagues and friends.

¹ SFSU Students registered in the paralegal program will attend at no fee for the presentation.

The SFLPA is an accredited MCLE Provider through Legal Secretaries, Incorporated. For more information about the programs offered through the SFLPA, visit our website at: www.SFLPA.org.

2018-2019 Committee Members

| | |
|--|--|
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| Legal Procedures - Open | Reno Bus Trip Crystal Rivera, Corene Rodder |
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2018-2019 Executive Board



Brenda Bracy, CCLS
President

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



Kelly Leca
Secretary

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



Marci Frazier
Treasurer

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



Jan Ainsworth
Governor

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



Crystal Rivera
Executive Advisor

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



Astrid Furstner, CCLS, OCP, CORE Registered Paralegal Parliamentarian

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



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