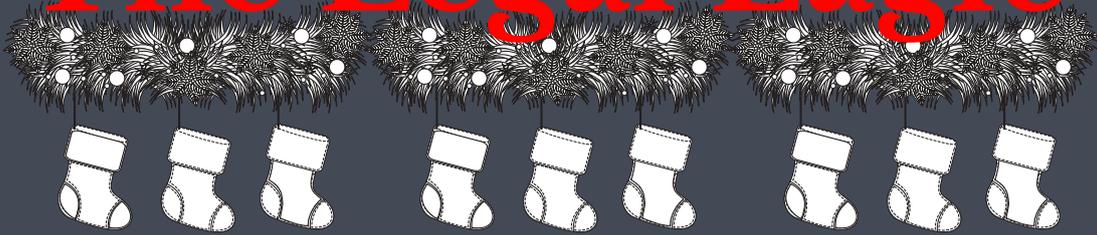


The Legal Eagle



Contents

- 3 President's Message
- 6 Governor's Report
- 11 Upcoming Conferences
- 12 November Dinner Meeting
- 15 November Vendor of the Month
- 16 Member News
- 18 Fairytale Town Halloween
- 19 Law Office Products & Management
- 21 California Certified Legal Secretary
- 24 Reno Bus Trip
- 26 Committee Members
- 27 Executive Board



Holiday Display at The Doco



Current and Upcoming Events



SLSA Board Meeting



SLSA Board Meeting



SLSA Dinner Meeting
Mock Trial and Ornament Exchange



SLSA Dinner Meeting
Mock Trial and Ornament Exchange



MERRY CHRISTMAS
ALL COURTS ARE CLOSED



Merry Christmas

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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- ✓ Secure Records Delivery™ Application
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DATA INTELLIGENCE**



President's Message

By: Brenda Bracy, CCLS

Happy Thanksgiving to everyone. I hope you all have a great holiday with your family and friends. Think about what you are thankful for this year. I am thankful for my family and my friends. I am truly blessed to be on the Board of such an amazing organization. I have met some wonderful people and I have some life time friends just because I decided to join Sacramento Legal Secretaries Association. I have had a tough year and I couldn't have made it without the support my friends have given me. I thank each and every one of you. If you take any family photographs, please send them to our Bulletin Editor, Dawn Forgeur, CCLS at editor@slsa.org.

With the end of the year approaching, we will hold our annual Mock Trial on December 13, 2018. We look forward to everyone attending this year. We will also have our ornament exchange following the Mock Trial. We will do the stuffing of the Christmas stockings on December 18, 2018. Please bring your donations to the December 13, 2018 Mock Trial. Or, you can email a Board member and we will make arrangements to have your donations picked up at your office.

Several SLSA members attended LSI's Second Quarterly Conference which was held in Reno on November 9-11, 2018. The conference was educational and entertaining. I attended two education classes, and both were outstanding.

The federal class was about human trafficking. The speaker travels around the globe meeting with people and is trying to get a handle on this very sad situation. The speaker talked to us about how young girls and women are recruited by these sex traffickers and are swiftly sent out of the country and how hard it is for them to break free. These people show up all over the place and promise a better life and lucrative jobs. Desperate people are vulnerable and they get sucked in before they know it.

The civil class that I attended was about a court drug addiction program. The speakers were a prosecutor, defense attorney and a psychologist. They spoke about how you get into the program, and how it works. Not everyone gets in, and not everyone successfully graduates. The program is very intense and lasts at least a year. It is only available to people who have been arrested and have a drug, alcohol or gambling problem. The program keeps people out of the jails and allows them to work, but they must comply with very strict rules in order to stay in the program. If they fail, they go back to jail and serve out their sentences. I thought this was a great idea and I hope other counties do similar programs in the future.

LSI is continuing to offer educational opportunities for its members. You can check out the classes offered on the LSI website at LSI.org. If you attend a seminar or class, please send our Governor, Jan Ainsworth, an email that you attended, or go to our website, www.SLSA.org and fill out the CAPS form.

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



Sacramento Legal Secretaries Association



Holiday Mock Trial

December 13, 2018

Law Offices of Clay Arnold
865 Howe Avenue
Sacramento, CA 95825



6:15 p.m. - - Dinner & Program
Followed by Ornament Exchange

**“Rudolph the Red-Nosed Reindeer v. Santa Claus, Inc.,
United Reindeer Workers Local #8, et al. - - A Case of
Bullying at the North Pole”**

\$25 per person* (Includes Pizza, Dessert, Soda & Bottled Water)

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

Ornament Exchange!



Bring a wrapped/bagged ornament (under \$10) to participate in the ornament exchange immediately following the mock trial.

RSVP by Noon on Monday, Dec. 10*

Two Ways to Register:

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

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

Volunteer Actors Needed for the Following Roles:

- Judge
- Court Clerk
- Bailiff
- Plaintiff’s Counsel (ROLE HAS BEEN FILLED)
- Defense Counsel (ROLE HAS BEEN FILLED)
- Plaintiff – Rudolph the Red-Nosed Reindeer (ROLE HAS BEEN FILLED)
- Defendant – Santa Claus, President and CEO - Santa Claus, Inc.
- Defendant – Comet, President - United Reindeer Workers Local #8, and Head Reindeer Coach
- Hermey the Elf
- Head Elf
- King Moonraker
- Clarice (Rudolph’s Girlfriend)
- Yukon Cornelius (ROLE HAS BEEN FILLED)
- Charlie-in-the-Box
- The Abominable Snowman
- Fireball (Rudolph’s Friend)
- Jurors (at least 5)

Please contact Lynne Prescott to volunteer:
lprescott@somachlaw.com

**Add \$5 after deadline. Cancellations must be received 48 hours in advance for a refund. No-Shows will be billed.*

ANNUAL STATE DAY IN COURT

PRESENTED BY THE
SACRAMENTO LEGAL
SECRETARIES ASSOCIATION

SPEAKERS INCLUDE COURT CLERKS
& EXECUTIVE OFFICERS

17

January 2019

EXHIBITOR GALLERY & NO-HOST BAR 4:45 P.M.-6:15 P.M.
DINNER 6:15 P.M.

Dinner will be Held at

HILTON ARDEN-WEST
2200 HARVARD STREET
SACRAMENTO, CA 95815



PARKING WILL BE VALIDATED BY HOTEL

SLSA MEMBERS: \$45

NON-MEMBERS: \$50

HOW TO REGISTER:

Deadline to Register: January 11, 2019
Add \$5 after Deadline

OPTION 1: ONLINE AT
WWW.SLSA.ORG UNDER UPCOMING
EVENTS (PREFERRED)

OPTION 2: VIA E-MAIL AT
RESERVATIONS@SLSA.ORG
(PLEASE INCLUDE MENU CHOICE)

MAKE CHECKS PAYABLE TO "SLSA"
AND MAIL TO:
CORENE RODDER
C/O SOMACH SIMMONS & DUNN
500 CAPITOL MALL, SUITE 1000
SACRAMENTO, CA 95814

MENU

1. CHIMCHURRI FLANK STEAK, GARLIC MASHED POTATO, FRESH VEGETABLE DU JOUR
2. CHICKEN CONCASSE WITH FRESH TOMATO AND BASIL, GARLIC MASHED POTATO, FRESH VEGETABLE DU JOUR
3. MANICOTTI STUFFED WITH SPINACH, MASCARPONE, LEMON BUERRE BLANC, FRESH VEGETABLE DE JOUR

CONTACT JESSICA PATTON
WITH EVENT QUESTIONS
E: JESSICAP@SDNLAW.COM
T: (916) 448-7888

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

Governor's Report

By: Jan Ainsworth

We "Fell Into Winter" at LSI's Second Quarterly Conference held at The Silver Legacy Hotel, Reno, Nevada, November 9-11, 2018, and a good time was had by all. Fifteen LSI Directives were responded to; eight SLSA members were in attendance; four LSS seminars were attended; four participated in Game Night; and two Opportunity Drawing donations. SLSA earned 900 Chapter Achievement points.

CHAPTER ACHIEVEMENT POINTS TO DATE: 18,100

LSI's Third Quarterly Conference will be held February 15-17, 2019, at the Viejas Hotel and Resort in Alpine, CA; Host Association: San Diego County LSA.

The "#MeetLSI" Membership Contest is in full swing and runs from now until January 31, 2019.

The 2018 revision of the LOPM and LPH have been completed and sent to Rutter. The PRC will begin revising the LOPM and LPH for 2019 shortly. The LOPM will be soft-bound and replaced in its totality annually, so no more hard bound editions with multiple inserts. In addition, the LOPM will not contain any Judicial Council forms. Instead there will be links to their location.

As of November 2018, the LSS has 159 members and a new logo to differentiate itself from the LSI logo. Check it out here:



LSI has a total membership of 1,192, which includes 29 Members-at-Large, 25 Student Members, and 7 Associate Members.

The CEC Coordinator reported that there is discussion of changing "Online Discovery Class" to "Advanced Discovery Class."

There is also discussion regarding recorded online webinar offerings in the 2019-2020 fiscal year. LSI would like you to have access to an on-demand feature. In this way, if you are unable to attend a webinar, you can still access it on-demand for a time limit yet undetermined.



Governor's Report, cont.

The LSI Treasurer recommended amending Standing Rule ("SR") 2.15 to reflect current procedure. SR 2.15 currently reads: 2.15. Oral reports of LSI Officers and Committee Chairmen shall be limited to two minutes each, except that of the Treasurer. The recommendation is to delete the words "except that of the Treasurer." There was no discussion. The ayes had it and SR 2.15 was adopted as printed in the LSI Executive Resume.

RECOMMENDATION #1:

The Marketing Committee recommended simplifying SR 13 re items available through corporate office. I will not regurgitate the items, their unit price, and the costs of handling and shipping. The Recommendation is to strike the entire SR 13.1 and insert the following:

13.1 Items sold through Corporate Office shall be listed on LSI's website and on the order form provided in The Legal Secretary magazine. The prices indicated shall include any applicable sales tax, plus 15% of the total cost of the order for shipping and handling. The costs for shipping and handling shall be waived for orders placed and prepaid at LSI Conferences. Individuals have thirty (30) days from the date the item(s) are delivered, based on the USPS tracking, to return items in a saleable condition. Original and return freight charges are the responsibility of the customer. Freight collect shipments will not be accepted. For your protection, we recommend using a traceable shipping method or insured Parcel Post. Shipping costs are non-refundable.

There was no discussion. The ayes had it. SR 13.1 was adopted as printed in the LSI Executive Resume.

RECOMMENDATION #2:

The recommendation is to insert the following as Standing Rule 13.3:

13.3 The following items may be ordered through Corporate Office for a nominal charge or downloaded for free from the LSI website: (a) Brass Tacks; (b) Guidelines for Preparation of a History Book; (c) Guidelines for Preparation for a Legal Education Program; (d) Guidelines for Hosting LSI Quarterly/Annual Conference; (e) LSI Bylaws and Standing Rules; (f) LSI History.

There was no discussion. The ayes had it. SR 13.3 was adopted as printed in the LSI Executive Resume.

CCLS: Congratulations to SLSA Member, Susan Heu, CCLS, who passed the September 2018 CCLS exam. If you see Susan, please congratulate her on a job well done. That's hard work.

Webinars: So that LSI can keep up with the high demand for webinars, they are closing online registration two days prior to a webinar. In this way, they are able to get the login information out to all registrants in a timely manner.

Social Media: Some of LSI's social media links have changed. They are:

Website: www.lsi.org

LinkedIn: <https://www.linkedin.com/in/meetlsi/>

Instagram: https://www.instagram.com/legal_secretaries_inc/

Facebook: <https://www.facebook.com/MEETLSI/>

Twitter: <https://twitter.com/MeetLSI>

November Conference Pictures



November Conference Pictures



Chapter Achievement Reporting Form

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

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

Date of Event Event

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

Name: _____ Email: _____

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

Upcoming Conferences



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

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

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

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

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

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

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

Updated 8/23/18



November Dinner Meeting

By: Lynne Prescott, CCLS

Ethical and Efficient Records Retrieval Heidi Cornell, Macro-Pro, Inc.



Our guest speaker for the November dinner meeting was Heidi Cornell, Regional Manager of Marketing and Sales for Macro-Pro, Inc. Heidi is also a member of SLSA. Her presentation was on "Ethical and Efficient Records Retrieval."

Heidi reminded us that ethics are a "should do," while laws are a "must do." Laws are a codifying of ethics with penalties. In the past, medical records were not always protected, even though it was ethical to do so. As a result, laws were written to provide protection for the patient and punishment for the offenders. Medical record retrieval laws, including HIPAA, are covered under federal and state statutes. These laws are written primarily for the protection of the patient. It is important to note that California's Constitution declares privacy an inalienable right, and California state law protects the privacy of individually identifiable personal information and the release of medical and other types of records.

Personal medical information in the wrong hands can lead to blackmail, loss of income, embarrassment, etc. Medical records often contain personally identifiable information, which is often used in identity theft cases and can result in major financial losses for the victim. The HIPAA privacy rule, 45 C.F.R. § 164.501 *et seq.*, requires a HIPAA-compliant authorization signed by the patient or their assignee with sufficient information to identify the patient's records.

Heidi stated that while there are many different types of medical records, some have more legal protection than others:

- Standard Doctor Visit Records
- Hospital
- Clinic Records
- Physical Therapist
- Substance Abuse
- Psychological
- HIV/AIDs

Records concerning substance abuse, psychological, genetic, sexually-transmitted disease and HIV/AIDS information have more legal protection because of the social stigma that may attach to them. Most facilities will only release these records with a special patient-signed authorization that specifically authorizes the release of these records. A subpoena may be used ONLY when plaintiff has raised the issue and claim of injury is related to drug, alcohol, psych/stress, genetic, sexually-transmitted disease or HIV/AIDS.

HIPAA

HIPAA, as we commonly refer to it, stands for the Health Insurance Portability and Accountability Act, also known as the Kennedy-Kassebaum Bill, and was signed by President Clinton in 1996. HIPAA is a part of the federal law that protects the "Privacy of Individually Identifiable Health Information." CFR Title 45 - Public Welfare § 164.508. HIPAA applies to "covered entities," such as healthcare providers, health plans, healthcare clearinghouses and their contracted business associates. HIPAA also codifies the conditions under which the covered entities may release records and details the requirements for valid authorizations.

November Dinner Meeting, cont.

In order for an authorization for records to be HIPAA compliant, it must contain the following:

- The information to be disclosed.
- The name of the facility that is the custodian of the patient's records.
- The name of the entity that is entitled to receive the records and their agent.
- The purpose of the disclosure.
- A statement informing the patient of the right to revoke, the procedure to revoke, and any exceptions to that right.
- The date on which the authorization will expire or the occurrence upon which it will expire.
- The signature of the patient and the date the patient signed.

HIPAA and the California Privacy Code does apply to attorneys obtaining records. You must use HIPAA-compliant authorizations and you must protect the information you receive. HIPAA does not apply to lawful subpoenas.

Role of the Subpoena Service

The role of the subpoena service is to: act as the deposition officer; obtain the records efficiently and timely; ensure code requirement compliance; memorialize, retain and distribute records; and, support the client's discovery efforts. The subpoena service must be in compliance with Code of Civil Procedure section 2020.420 and must be a professional photocopier. (Bus. & Prof. Code, §§ 22450-22463.) They must be registered in the county where their main office is located. The subpoena service must be bonded, and one member of management must be a Notary Public.

The subpoena service should provide for timely service, both statewide and nationally, and should have a database of custodian requirements/preferences. They should be highly experienced with difficult custodians (i.e., Stanford, Kaiser billing), and be capable of advancing fees or can issue checks for fees. The subpoena service should ensure that all parties receive the same records.

Some exceptions allow attorneys to act as a deposition officer, primarily that the attorney "shall not be financially interested in the action" and "shall not act as an advocate before a jury which will hear testimony from a member except under specific circumstances."

How Do You Word Your Request So You Receive All Relevant Information?

Start with standard things like case name, person's identifying information, records requested, etc. Your provider can assist with wording, and some facilities have formal descriptions for what can be released. Be mindful that some records are not in the standard file, so ask for specific items as necessary; for example, brain scan, fetal monitor strips, psychiatric records. Ensure all pertinent jurisdictional code requirements are adhered to and that all parties are properly noticed. Be aware of upcoming dates such as depositions, mediations, trial, and communicate those to your service provider. Make sure you include clear, identifiable information for locating records such as date of birth, SSN, policy and account numbers, etc.

Government Records

There are different requirements for government records, especially for Medicare and Medi-Cal, where the patient gets their own records or the authorization is on behalf of the patient. The federal government cannot be subpoenaed with a state subpoena, and you must use a federal authorization to obtain records. The consumer/plaintiff must sign and date the authorization forms. Note that some federal agencies can take up to a year to get records.

November Dinner Meeting, cont.

Military records and records from the Social Security Administration must go through the appropriate federal agency channels. To avoid any delays or having the request rejected, all required fields must be completed, signed and dated, and you must specify the type of records you are requesting. They will not honor generalities such as "Any and All" or "Entire File."

Local government emergency services records, such as from the fire department, police department, paramedics/EMT agencies and ambulance companies, are NOT filed by the person's name, date of birth or SSN, but by the date and place of incident. To secure these records, it is extremely important to provide the date, time and place of incident, as well as the address, cross streets or freeway exits, if known.

Out-of-State Subpoenas

Regarding out-of-state subpoenas, until recently a subpoena from one state would not work to obtain records for a service provider or incident in another state. However, the Interstate Depositions and Discovery Act allows litigants to present to a clerk of the court located in the state where discoverable materials are sought, a California subpoena for a California case. Once the clerk receives the California subpoena, the clerk will issue their state subpoena for service and attach it to the California subpoena. Both subpoenas are served upon the person or entity to which the original subpoena is directed. The terms of the issued subpoena must incorporate the same terms as the original subpoena and contain the contact information for all counsel of record and any party not represented by counsel. There are several states that have not enacted the Interstate Depositions and Discovery Act: Connecticut; Nebraska; Maine; Massachusetts; Missouri; Texas; Florida; Wyoming; and, the U.S. Commonwealth of Puerto Rico.

You DO NOT have to obtain records under UIDDA if the entity being subpoenaed is located out-of-state and the records are located out-of-state, but the entity is registered with the California Secretary of State as a foreign corporation. The entity must have a designated agent for service of process inside the State of California, and the entity must have performed the service or the incident must have occurred inside the State of California. Then the entity MUST honor a California subpoena for records.

Roadblocks and Challenges

Roadblocks and challenges can occur with any subpoena or records request. An objection is designed to be used by a non-party to the case, usually the facility whose records are being subpoenaed. However, opposing counsel will often send an objection letter to the facility telling them not to release records. Most of the time the opposing counsel wants to limit the scope of the subpoena. The attorneys confer and, if agreement is not obtained, the opposing counsel may file a motion to quash.

If a motion to quash is filed with the court, all work to obtain records must cease. Any objection or motion to quash should be served on the attorney and the record retrieval company. If there is an order to quash, or if the objection is agreed upon by the attorneys, all records subject to the order or agreement obtained, but not yet distributed, must be destroyed by the record retrieval company.

Receiving Improper Records

The custodian is responsible for releasing only the records called for in the authorization or the subpoena. Sometimes the custodian inadvertently releases records that contain substance abuse, psychological, HIV/AIDS records, or records that include the medical records of another person. Usually these records are discovered by the attorney or their staff as they go through the records. Once these records are discovered, all persons in possession of the records should destroy them. This includes the record retrieval company.

SLSA is very grateful to Heidi and Macro-Pro for providing such in-depth information on this very important topic.

Vendor of the Month

By: Jennifer Estabrook, CCLS

Our Vendor of the Month for November was Heidi Cornell of Macro-Pro. An international records retrieval company, Macro-Pro is a certified WBE (women-owned business enterprise) that has been in business for over 25 years. Macro-Pro has served and obtained legal documents and located people all over the world and maintains many specialized authorizations to expedite the retrieval process. Photocopying, scanning and x-ray duplication are available on or off-site and document delivery can be accomplished via paper, CD, USB, secure email, encrypted online download and secure file transfer (SFTP) directly to the client's server. Macro-Pro prepares and serves civil, federal, workers' compensation and longshore subpoenas and signed authorizations. Other services offered include medical record summarization, permanent disability calculators, expert witnesses for lien trials, CEU training and workshops, and investigations and special searches. For more information you may contact Macro-Pro at (800) 696-2511 or www.macropro.com.



Member News

By: Jaime Gooch

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

ACTIVE MEMBERSHIP

Mary Fisher – Mary is a Supervising Legal Secretary at the Sacramento County Office of County Counsel, and has been employed as a legal professional since 2012. She specializes in family law, law office management, and juvenile dependency. She celebrates her birthday on April 22. She has been a member of Placer County LPA 2015-2018 and San Mateo LSI 2012-2015.

Fatima Qaumi – Fatima is an Administrative Legal Secretary at California Rural Legal Assistance, Inc., and has been employed as a legal professional since 2000. She specializes in criminal law, law office management, and litigation. She celebrates her birthday on June 30 and enjoys travel and family events.

Happy December Birthdays!



- Shareen Khan - December 7
- Linda Gerst - December 8
- Debbie Jordan - December 10
- Karen Takao - December 11
- Serena Heller - December 14
- Serena Pena - December 16
- Maria Cantrell - December 17
- Margie Fair - December 19
- Marci Frazier - December 20
- Anna Marie Argumedo - December 28

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Business Development Executive
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Member News, cont.

CONDOLENCES

With deepest sympathy, our thoughts and prayers are with you.

*SLSA member Mary Taylor's mother has passed away.
Cards of condolence can be sent to Mary at the following address:*

*Mary Taylor
3301 N. Park Drive, #212
Sacramento, CA 95835*

*The mother of Michelle Tice, San Diego LSA's Governor, has passed away.
Cards of condolence may be sent to:*

*Michelle Tice
1774 Fuerte Estates Drive
El Cajon, CA 92019*

The mother of Cathleen McGrath Siler of Long Beach LPA, and former LSI Social Media Chair, has passed away. Cards of condolence may be sent to:

*Cathleen McGrath Siler
779 Stone Harbor Circle
La Habra, CA 90631-8935*

*The father of former LSI PRC Assistant Editor, Linda Moore has passed away
Cards of condolence may be sent to:*

*Linda Moore, CCLS
5350 Baltimore Drive, #55
La Mesa, CA 91942*



Halloween at FairyTale Town

By: Deseree Aguillen

This year's Fairytale Town's Safe & Super Halloween theme was **Dinosaurs**. There were over 10,000 attendees! This year's craft was paper plate dinosaurs; there were also coloring sheets for the younger children. **A huge THANK YOU to:** Paul Simmons, Andy Hitchings, Theresa Barfield, Crystal Rivera, Corene Rodder, Brenda Bass, Brenda Bracy, CCLS, Gloria Kendrick, Sheila Kelley, Marcia Ney, Dawn Willis, Downey Brand, Morgan Lefforge, Isis Estrada and Shannon Kline for your generous candy donation, Tristan Hopkins at Capitol Digital for photocopying the coloring sheets and to all the volunteers; this event couldn't have been possible without all of you.



SAN DIEGO LEGAL SECRETARIES ASSOCIATION
Presents
VIVA LAS VEGAS
February 15-17, 2019
Viejas Casino and Resort, 5000 Willow Road, Alpine, CA 91901
<https://viejas.com/>
Legal Secretaries, Incorporated
2019 Third Quarterly Conference

CONFERENCE REGISTRATION INFORMATION

NAME (AS IT WILL APPEAR ON BADGE): _____
MAILING ADDRESS: _____
CITY/STATE/ZIP: _____
HOME TELEPHONE: _____ WORK TELEPHONE: _____
EMAIL ADDRESS: _____
LOCAL ASSOCIATION (DO NOT ABBREVIATE): _____ LSA LPA

PLEASE CHECK IF APPLICABLE (INCLUDE TITLE):
STATE OFFICER: _____ STATE CHAIRMAN: _____
 GOVERNOR CCLS PLS

SCRIP TICKET (INCLUDES REGISTRATION, WELCOME RECEPTION, BANQUET, AND BRUNCH):
POSTMARKED ON OR BEFORE JANUARY 18, 2019 @ \$150.00 \$ _____
POSTMARKED ON OR AFTER JANUARY 19, 2019 @ \$160.00 \$ _____

INDIVIDUAL TICKETS:
REGISTRATION ON OR BEFORE JANUARY 18, 2019 @ \$25.00 \$ _____
REGISTRATION ON OR AFTER JANUARY 19, 2019 @ \$35.00 \$ _____
WELCOME RECEPTION (FRIDAY) @ \$30.00 \$ _____
* GOVERNORS LUNCHEON (SATURDAY) @ \$32.00 \$ _____
* PRESIDENTS LUNCHEON (SATURDAY) @ \$32.00 \$ _____
* OPEN-NEWCOMERS LUNCHEON (SATURDAY)** @ \$32.00 \$ _____
 SOUTHWESTERN CHICKEN WRAP ROAST BEEF ON SOUR DOUGH ROASTED VEGETABLE SANDWICH
BANQUET (SATURDAY):
 MACADAMIA NUT MAHI MAHI HERB GRILLED CHICKEN ROASTED VEGETABLE WELLINGTON @ \$73.00 \$ _____
BRUNCH (SUNDAY) @ \$38.00 \$ _____

TOTAL AMOUNT PAID: \$ _____

SPECIAL DIETARY REQUEST (INCLUDING VEGETARIAN): _____

MAKE CHECKS PAYABLE TO: SDLSA FEBRUARY 2019 CONFERENCE FUND
SEND TO: CYNTHIA HALVAX, CCLS C/O NEIL DYMOTT
110 WEST A STREET, SUITE 1200, SAN DIEGO, CA 92101

OR
REGISTER ONLINE AT WWW.SDLSA.ORG A PAYPAL FEE OF \$5 WILL BE ADDED TO YOUR TOTAL
**THE OPEN-NEWCOMERS LUNCHEON IS FOR EVERYONE. LEARN ABOUT MEMBERSHIP, MARKETING, AND THE BENEFITS OF BEING A MEMBER OF LSA.

****NO REFUNDS AFTER FEBRUARY 5, 2019****

SAN DIEGO LEGAL SECRETARIES ASSOCIATION
Presents
VIVA LAS VEGAS
February 15-17, 2019
Viejas Casino and Resort, 5000 Willow Road, Alpine, CA 91901
<https://viejas.com/>
Legal Secretaries, Incorporated
2019 Third Quarterly Conference

HOTEL REGISTRATION INFORMATION

ACCOMMODATIONS: (Plus applicable taxes and fees)

| | | |
|---------------|--------------------|----------------------|
| Single/Double | \$149.00 per night | |
| Triple | \$169.00 per night | |
| Quadruple | \$189.00 per night | |
| | Check in is 4 p.m. | Check out is 12 p.m. |

RESERVATIONS: 1.800.938.2532 **GROUP CODE:** 190214Legal

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

Parking: Complimentary Self-Parking or Valet Parking
Airport: From San Diego International Airport, it is 39 miles to Viejas
Transportation: Super Shuttle <http://www.supershuttle.com/default.aspx?GC=CT8WB>
A shared ride shuttle offers 5% discount one way; 10% discount round trip
Reserve online or call 1-800-Blue-Van and use the code: **CT8WB**
Internet: Complimentary in guest rooms and meeting rooms

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

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

For additional information contact:

THIRD QUARTERLY CONFERENCE CO-CHAIRS

| | |
|---|---|
| Leanna Pierce 619.248.0970 lpierce@mornslawfirmapc.com | Renee Evans, CCLS 619.823.7332 renee.evans915@yahoo.com |
|---|---|

Law Office Products and Management

By: Gisele Mitsuk

Hello SLSA members! In past newsletters I've submitted articles on tips & tricks as well as an article on interpersonal management. I'm not sure about you, but I love learning time-saving keystroke tips and neat tricks to do with software. The less time that I spend with my mouse and the more time I spend with my keyboard, the more efficient I can be with my work. And I really like efficiency. So let me share a few Microsoft Outlook tricks that you may not already know.

Microsoft Outlook - on PC

Need to create a new email, pronto?

Ctrl + N is your answer. Just be sure your Outlook main window is open and activated. If your computer is currently active on a different application, easy peasy... **Press & Hold** the **Alt** key with your left thumb, Press the **Tab** key with your ring finger once, twice, as many times as you need until the main Outlook window is shown in your list of open applications.



Image by Ddfairchild on No Man's Sky Wiki

Want to send your email in a hurry?

Press Ctrl + Enter. You'll be asked by Outlook if you'd like to attribute this keyboard shortcut to "sending email." I recommend unchecking the box next to "Don't ask this question again" and clicking "Yes." Allow that window to pop up about 4-5 times. By then you'll have cemented in your muscle memory the action of **Ctrl + Enter** and you can leave the box checked.

Need to create a new appointment?

Same trick as creating a new email. Be sure you are in Outlook on the calendar page. Then **press Ctrl + N**. Once you are in the new appointment, you can **press Tab** to get to the next field. **Press Shift + Tab** to return to the previous field.

What about shortcuts between the different functions in Outlook? Easy! Read on!

How do I get to the Outlook Calendar by just using the keyboard?

Another easy solution! If you are actively in Outlook email/contacts/tasks/folders, etcetera, and you want to access the calendar, **press Ctrl + 2**.

How do I access Outlook Inbox from other Outlook functions using the keyboard?

Another easy solution! **Press Ctrl + 1**.

How do I access Outlook contacts from other Outlook functions using the keyboard?

Another easy solution! **Press Ctrl + 3**.

There are shortcuts to each of the other Microsoft Outlook functions. For the full shortcut list, visit: www.craigbailey.net/tip-outlook-keyboard-shortcut-to-switch-between-email-calendar-etc/

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. Please let me know what you want to see, what you liked, what you didn't like, if you'd like to learn about a particular software program used in the legal field, and if you'd like to learn something more complex or "keep it simple"!



LSI
*Educating California's
Legal Support Professionals*

**BEGINNING LEGAL SECRETARIAL
TRAINING CLASS**



**NextGen
→ Legal**

LSI will be offering its Beginning Legal Secretarial Training Class online. This class will be an eight-week, work-at-your-own-pace online session commencing January 7, 2019 and ending March 4, 2019. During the classes, the following topics will be covered:

| | |
|---|--|
| Introduction to the Law Office Duties of the Legal Secretary Effective Telephone Skills Effective Oral Communication Skills Calendaring and Timetables Basic Grammar Skills Transcription and Proofreading Techniques Court Structure Citations | Service of Legal Documents Preparing a Proper Caption Preparation of Documents Filed with the Court Basics of Civil Litigation Interrogatories Demand for Production of Documents Requests for Admissions Depositions/Deposition Subpoenas Demand for Physical Examinations Discovery Timelines, Service and Verifications |
|---|--|

CLASS SESSION OPENS ON MONDAY, JANUARY 7, 2019

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 cost of the training class, which includes the Legal Secretary's Reference Guide, is \$180 for LSI members/\$250 for non-LSI members. Each individual must register separately. Upon completion of the class, students will receive a certificate from LSI.

BEGINNING LEGAL SECRETARIAL TRAINING CLASS REGISTRATION
(Please type or print clearly)

Name: _____ Email: _____
 Address: _____
 City/Zip: _____ Telephone: _____

\$180 LSI Member _____ Association: _____ **LSA/LPA**
 \$250 Non-LSI Member _____

Payment: Check # _____ (made payable to LSI)
 (Note: Checks must clear before books will be mailed and may cause a delay in access to the class.)
 Name on Card: _____
 Visa/MC Credit Card # _____
 Exp. Date: _____ 3-digit CVV No.: _____ Zip Code: _____

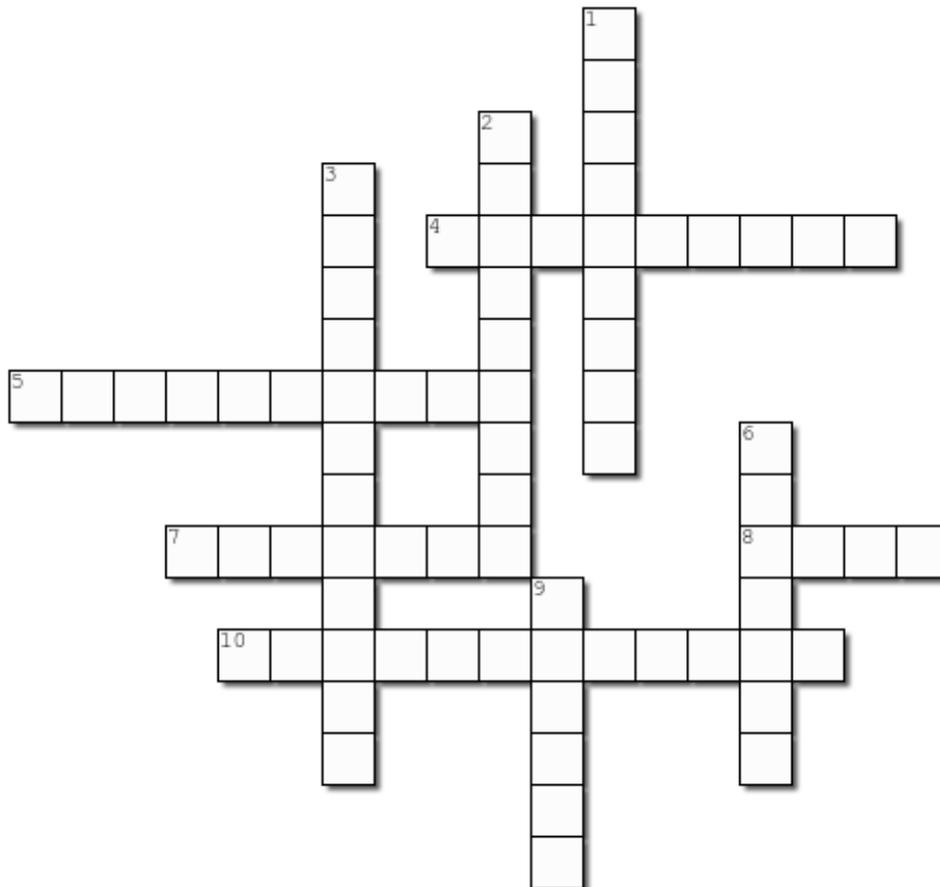
Email registration form **NO LATER THAN January 2, 2019**, to LSI Legal Professional Training/ Seminar Chair, training@lsi.org or mail to LSI, 2520 Venture Oaks Way, Suite 150, Sacramento, CA 95833. Registration will also be offered online at www.lsi.org with PayPal. Keep in mind books will not be mailed until registration is processed. For further information or inquiries, email training@lsi.org. No refunds after January 7, 2019. CCLS credit has been approved under Section 1e of the Standards for Recertification re self-study.

LSI – Educating California's Legal Professionals

California Certified Legal Secretary

By: Elizabeth Madden, CCLS

Complete the crossword below



Created using TheTeachersCorner.net [Crossword Puzzle Maker](#)

- | | | | | | | | |
|------|-----------|---------|---------|------------|--------------|-----------|--------------|
| ergo | deviation | abscond | onerous | capricious | digest | bona fide | acquiescence |
| | | | | aforesaid | conciliation | | |

Across

- 4. In good faith; meeting all the requirements
- 5. Not based on fact, law, or reason
- 7. Hide or sneak away to avoid arrest, a lawsuit, or creditors
- 8. Therefore; consequently; hence
- 10. The process of bringing together two sides to agree to a voluntary compromise

Down

- 1. A departure from usual conduct, such as an employee's use of work time for personal business
- 2. Archaic term meaning something previously mentioned in the same document
- 3. Silent agreement; knowing about an action or occurrence and remaining quietly satisfied about it
- 6. Unreasonably burdensome or one-sided
- 9. A summary of law or legal principles which condenses or explains the information



LEGAL SECRETARIES, INCORPORATED

CCLS ON-LINE STUDY GROUP

January 6, 2019 – March 10, 2019



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

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

***** NEW *****

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

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

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

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

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

CCLS STUDY GROUP REGISTRATION

(Please type or print clearly)

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

10-Week Study Group:

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

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

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

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

DEADLINE TO REGISTER IS DECEMBER 26, 2018. Send registration to Terrie Quinton, CCLS, LSI CCLS Chair, c/o Duckor Spradling Metzger & Wynne, 101 W. Broadway, Ste. 1700, San Diego, CA 92101 or email lsiccls@outlook.com (with credit card information). You may also pay via PayPal at www.lsi.org. **NO REFUNDS AFTER DECEMBER 28, 2018.**

STRIVE FOR SUCCESS – BE A CCLS!



California Certified Legal Secretary
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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)

(Select one)

Northern California

Saturday, March 16, 2019

Southern California

Saturday, September 21, 2019

- **Deadline:** Applications must be received **60 days** prior to the examination date.
- **Late Application:** Late Fees apply when Applications are received less than **60 days** (but not less than 30 days) prior to the examination date, and accepted only if space is available.
- **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) 45.00 | Late Fee (if applicable) 45.00 | |
| 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. September 2018

Reno Bus Trip

By: Crystal Rivera and Corene Rodder

This year's Reno Bus Trip was again themed Italian - Italian flags for everyone, and hats and aprons for volunteers. Everyone received an omaggio (gift) bag with goodies, and we had sweet rolls from Complex Legal Services. We almost had a full bus (a few people didn't make it), but everyone on the bus had a great time!

After we picked up our second group in Citrus Heights - and had our fabulous bartenders on board - we started serving libations and selling raffle tickets. Our Emcee and Game Show Host on the way up was Corene Rodder, who did a fantastic job (again)! We started the trip off with a door prize winner of \$100 cash, donated by Luke Patterson of Capitol Legal Investigations!

The first game we played was "Riddle Me This" which after given the list of riddles, our very smart attendees guessed the answers. Our next game was "Famous Quotes by Famous People" where everyone also got a sheet of famous quotes and had to match them up with the famous person. Our third game was "What's in Your Purse, Backpack or Wallet," a twist on Let's Make a Deal. Everyone had a great time finding all the bits and pieces on the list that earned points for each. We had a "good," "better," and "best" for our three top winners to choose from. By the time we finished our games, we were winding our way past the mountain and down into Reno.

It was a little breezy in Reno, but many people still enjoyed the Italian Festival that was held on Virginia Street. The festival was larger than last year and several blocks were closed off to traffic. There were booths galore, and the food was fabulously Italian! Others enjoyed playing at the tables or slots. Around 4:15 we loaded the bus, left Reno and headed back to Sacramento. On the way back, our Emcee and Game Show Host was Tammy Hunt, CCLS. We played a couple of games of ITALY (Bingo Italian Style) along with drawing of the winners of the many raffle prizes. The rest of the ride home was pleasant and we were sorry to see it end.

We hope to fill the bus next year! Watch for a Save the Date announcement for October 2019!



Reno Bus Trip, cont.

THANK YOU

The Reno Bus Trip Committee thanks all our generous sponsors:

- U.S. Legal Support \$500
- Boutin Jones \$250
- Capitol Digital \$250
- Sacramento Placement Service \$250
- Somach Simmons & Dunn \$250
- 95814 Digital \$100
- Lewis Brisbois Bisgaard & Smith \$100
- Capitol Legal Investigations, Inc. \$100

We also want to thank everyone who donated items for the trip and items for raffle prizes:

- 95814 Digital
- Aptus Court Reporting
- Atkinson-Baker Court Reporters
- Brenda Bracy, CCLS
- Capitol Digital
- Capitol Legal Investigations, Inc.
- Michelle Chavez, CCLS
- Compex Legal Services, Inc.
- E*TRADE

- Shannon Kline
- Lewis Brisbois Bisgaard & Smith LLP
- Macro Pro, Inc.
- Elizabeth Madden, CCLS
- Corene Rodder
- Crystal Rivera
- US Legal Support
- Veritext



SPECIAL THANKS TO OUR VOLUNTEERS

- Brenda Bracy, CCLS
- Jennifer Estabrook, CCLS
- Tammy Hunt, CCLS

- Mark Kline
- Shannon Kline
- Luke Patterson

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