

The Legal Eagle

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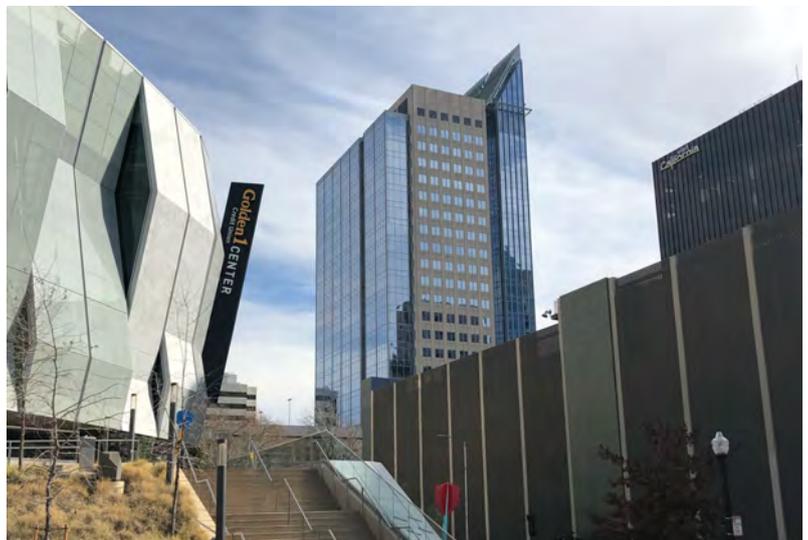


Photo credit: Dawn Forgeur, CCLS



Current and Upcoming Events



- Mar 5** Last Day to Register for LSI Webinar
Requesting Your Client's Medical Records
- Mar 7** LSI Webinar: Request Your Client's
Medical Records
- Mar 7** Last Day to Register for LSS Webinar
The Double Shift: Are Employees with Family
Responsibilities Protected from Discrimination?

- Mar 12** SLISA Board Meeting
- Mar 21** SLISA Dinner Meeting
Bankruptcy 101: The Basics
- Mar 21** LSS Webinar - The Double Shift: Are
Employees with Family Responsibilities
Protected from Discrimination?

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President's Message

By: Brenda Bracy, CCLS

Thank you for re-electing me as your President for my third term. I have had a wonderful year getting to know everyone. We gained a few new members this past year, and I look forward to adding more members again this year.

I would like to congratulate Marci Frazier, Vice President, Shannon Kline, Secretary; Marci Frazier, (interim) Treasurer; Corene Rodder, Governor; on being elected by acclamation at the February 2019 meeting. We do not have a Treasurer for this year, so Marci Frazier will be doing double duty. If you are interested in being a part of the Executive Board, please let me know.

I recently attended LSI's Third Quarterly Conference in Alpine, California. I attended two LSS classes. The first class was Calendaring, Filing Motions & Trial Readiness in Federal Court. The speaker was U.S. District Court, Southern District, CM/ECF Coordinator Joe Diaz. Mr. Diaz was very knowledgeable and spoke about the ins and outs of e-Filing in the U.S. District Court. He was a good speaker and I learned a few things that I did not know. The other class was Jury & Trial Consulting: How's & Why of Jury Consulting. The speakers were knowledgeable, personable, and entertaining. They told us a few stories about cases they had worked on in the past, and how they had handled the attorneys on those cases. I had never actually spoken with a jury consultant before, so I was really looking forward to attending this class.

The entertainment at the banquet was a blast. The food was good and the hotel personnel were friendly and helpful. The San Diego Legal Secretaries Association did a fantastic job hosting the Conference. Everyone who attended the Conference had a great time.

Last month was our Federal Day in Court event. We had a great turnout and the speakers did an outstanding job. I want to thank Jessica Patton and Terry Olson who did an awesome job as the co-chairs. I hope everyone that attended had a good time and got a chance to visit with each of the vendors.

We have a few committee chairs who are not going to continue in their respective positions for next year. If you would like to get more involved and be a part of this great organization, please let me know. It truly takes a village to run an organization of this size. In order to participate in the many community events that we do, we need everyone's participation. SLSA participates in many charitable projects and community events. SLSA has always given back to the community, and I hope you will support and volunteer to assist with these projects. In order to be successful and continue to support our community, we need more volunteers to participate.

I encourage you to attend the monthly meetings and take advantage of the education the speakers provide and get to know other members. You can also obtain MCLE and CCLS credit.

LSI is also a great source for continuing education. LSI offers a variety of educational opportunities for all of its members. The schedule of classes and conferences are listed on the LSI website at LSI.org. If you attend a seminar, class or conference, please send our Governor an email, 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



Dinner Meeting • March 21, 2019

Old Spaghetti Factory
1910 J Street - Sacramento

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



Bankruptcy 101: The Basics

This presentation will focus on the effects of filing a personal bankruptcy, what that entails, the difference between filing Chapter 7 and Chapter 13, the pros and cons of filing, and more.

Guest Speaker:

Jamie P. Dreher, Esq.
Partner, Downey Brand LLP



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.

RSVP by Midnight on Sunday, March 17*

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:

- Taste of Italy (Lasagna & Fettucine Alfredo)
- Spinach & Cheese Ravioli
- Chicken Parmesan

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

Thank You to Our March Vendor Partner!



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

Governor's Report

By: Jan Ainsworth

LSI's Third Quarterly Conference was held on February 15-17, 2019, at the Viejas Hotel & Casino in Alpine, California, hosted by San Diego LSA. Five SLSA members were in attendance; 11 CEC/LSS seminars were attended; SLSA chairpersons responded to 15 LSI Quarterly Directives in a timely manner for a total of 950 CAPs earned at February Conference. Sidebar: Sunny San Diego was not so sunny that weekend; it was cold, windy, and rainy just like Sacramento. Luckily, between meetings and educational opportunities, we were able to donate some money to the casino. The Viejas is located in the San Diego Mountains about 45 minutes away from the airport. Who knew San Diego had a mountain range? Not this governor. I guess that is why its locale is Alpine. Okay, okay. I will keep my day job; but seriously, San Diego actually had a snow day on February 21. Believe it or not!?

The 2018-2019 Chapter Achievement Contest is in its final quarter and in full swing by me. I have been/am/will be emailing many of you asking if you participated in certain categories. As you know, the contest runs from April 1, 2018, through March 31, 2019. The entry form is located on the LSI website under the Members Only section for your perusal. Please email me with any CAPs earned by or before March 15, 2019. It is not necessary to use the specified CAPS form. Your participation and cooperation is appreciated. Now let's go for the win again!

CHAPTER ACHIEVEMENT POINTS TO DATE: 25,000

The Board of Governors meeting convened Saturday at 9 am; 18 governors were present and there was a quorum. Note: This was a remote location; hence, the lower turnout of governors.

The Minutes of the November 2018 Quarterly Conference were timely mailed and approved. There was a motion that the actions of the Treasurer in paying the routine bills of LSI during the third quarter of fiscal year 2018-2019 be ratified. The motion carried. Membership dues (new Per Capita structure and Student/Associate Memberships begin) for the next fiscal year will be coming due May 1. Currently LSI has 1,274 members.

Friday Night Reception Photobooth



Brenda Bracy, CCLS, Jan Ainsworth, Dawn Forgeur, CCLS, Linda Brown



Brenda Bracy, CCLS, Dawn Forgeur, CCLS, Donna Day, Jan Ainsworth

Governor's Report, cont.

LSI launched the “Meet LSI” membership challenge in October 2018. There were 14 emailed entries representing 11 associations directed to LSI Vice President, Lynne Prescott, CCLS, between October 18, 2018 and February 8, 2019. The result, a three-way tie: Placer County LPA, San Fernando Valley LSA, and Stanislaus County LPA; and a \$75 check will be awarded to each winning association. We adjourned at 10:45 am for a coffee break sponsored by vendor, First Legal, then on to our educational opportunities and then luncheons.

At the Governors’ lunch, there was discussion of the Resume of the Executive Committee and their meeting held Friday, February 15. There was also continued discussion about a possible LSI name change. LSI Secretary, Rod Cardinale, Jr. continued to propose Legal Professional Inc. One governor proposed Legal Support Inc., so not to change any logos. “Support” was shot down immediately and more discussion followed. In the end, there was no decision and no motion is forthcoming.

Saturday’s Board of Governors meeting reconvened at 1:45 pm.

The nominations for LSI elected office are:

- President – Heather Edwards, San Fernando Valley LSA
- Vice President – Lynne Prescott, CCLS, Sacramento LSA
- Executive Secretary – Rod Cardinale, Jr., Santa Clara County LPA
- Treasurer – Donna Day, Alameda County LSA / Larry McGrew, San Francisco LPA

A brief biographical sketch of each nominee will be provided to local association governors by April 1, 2019.

We recessed at 2:27 pm for more educational opportunities with the LSS and to gussy up for banquet festivities. Let me just say that the banquet’s theme of “Viva Las Vegas” did not disappoint. Our entertainment consisted of LSI vendors, San Diego LSA, Cher, Dolly Parton, Jimi Hendrix, the Blues Brothers, and Donna Summers, with all the pomp that a Las Vegas show would encompass (DJ, disco ball, colored flashing lights, and over the top costumes); followed by a DJ and dancing until the Midnight hour. LSI’s website probably has photos posted of the event under their “Photo Gallery” tab. Check it out.



Cher, Corene Rodder, Brenda Bracy, CCLS, Dolly Parton, Debra Clark, Lynne Prescott, CCLS, Jan Ainsworth, Dawn Forgeur, CCLS, Donna Summer

Governor's Report, cont.

We reconvened Sunday morning with a call to order at 10:10 am with roll call dispensed. The theme was "Pool Party! Have A Splash!" with a Sunday "FUNday" brunch served buffet style. There were blow up pools, beach balls, life rings, flamingos, and even party drinkware with umbrellas and straws. As for business, there being no conference bids for August 2020, February 2021, May Annual 2021, and August 2021, the deadline was extended to April 30, 2019.

The winners of the four scrip tickets to the May 2019 Annual Conference are: Southern Butte LPA, Livermore Amador Valley LPA, Placer County LPA, and Mount Diablo LPA. We adjourned at 11 am until we meet again at the 85th Annual Conference, May 16-19, 2019, at the Doubletree by Hilton, Newark, hosted by Alameda County LSA. The theme for the conference will be "Through the Years" so get ready to go back to school!

Congratulations to your annual conference delegates: Maryanna Rickner, Marci Frazier, and Debra Clark, who were nominated and elected by acclamation at February's dinner meeting.

While I have your attention, I would like to express my sincerest gratitude to you entrusting me to be your Governor for the past four fiscal years. It has been a pleasure to serve you and I trust I kept you informed and somewhat entertained. However, the time has come for this governor to let in some new blood and for a new governor to take the reins on SLSA's behalf. Corene Rodder had the nomination and was elected at February's dinner meeting. Corene will make a fine accompaniment to your Executive Board and I promise to set her up for success. Corene attended February conference as our Governor in Training sitting with me at the Board of Governors meeting(s) and at the Governors' luncheon. Corene was a well-received enthusiastic participant and you will be in good hands with her at the governor's helm.

The above said – you are not rid of me just yet as I will be representing SLSA at May Annual Conference as your Outgoing Governor at the Pre-Annual Board of Governors Meeting and Corene will represent SLSA at the Post-Annual Board of Governors meeting to vote on the LSI proposed budget for fiscal year 2019-2020.



Corene Rodder - Incoming Governor
Sunday Brunch



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

*May 2019 Annual Conference
DoubleTree by Hilton Fremont/Newark
Dates: May 16-19, 2019
Scrip - \$135 / Room - \$159
Host Assn: Alameda County LSA*

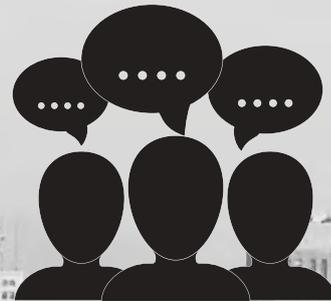
*August 2019 Quarterly Conference
Hilton Los Angeles North/Glendale
[Nearest Airport: Bob Hope/Burbank]
Dates: August 15-18, 2019
Scrip - \$182 / Room - \$175
Host Assn: San Gabriel Valley LSA*

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

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

*May 2020 Annual Conference
Hilton Arden-West
Sacramento, 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*



Parliamentarian's Corner

By: Astrid Furstner, CCLS, OCP, CRP



Corrections to Minutes

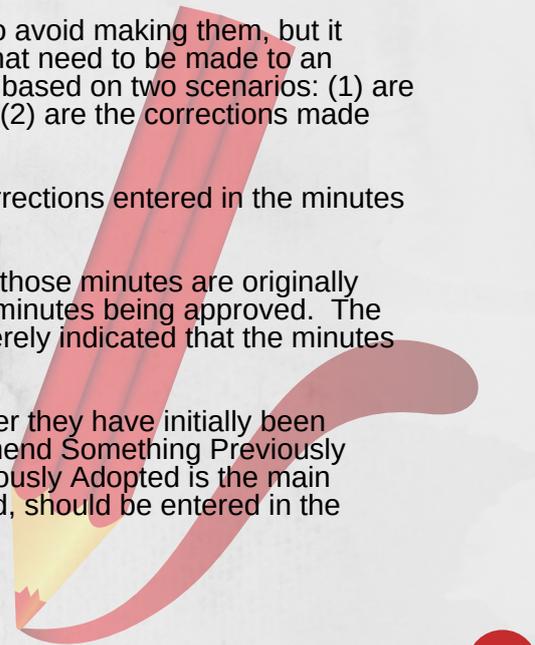
Mistakes happen everywhere and to anyone. Of course, we all try to avoid making them, but it inevitably happens. So, what happens when there are corrections that need to be made to an organization's minutes? Robert's Rules of Order offers suggestions based on two scenarios: (1) are the corrections made at the time they are presented for approval, or (2) are the corrections made after the minutes have already been approved?

Question: If minutes of a previous meeting are corrected, are the corrections entered in the minutes of the meeting at which the corrections were made?

Answer - Scenario 1: If corrections to minutes are made at the time those minutes are originally submitted for approval, such corrections are made in the text of the minutes being approved. The minutes of the meeting at which the corrections are made should merely indicated that the minutes were approved "as corrected."

Answer - Scenario 2: If it becomes necessary to correct minutes after they have initially been approved, such correction can be made by means of a motion to Amend Something Previously Adopted. In this event, since the motion to Amend Something Previously Adopted is the main motion, the exact wording of the motion, whether adopted or rejected, should be entered in the minutes of the meeting at which it was considered.

(Robert's Rules of Order, (10th ed.) at pp. 452 and 458.)



ANNOUNCEMENT

Increase in Dues

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

New dues effective May 1:

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

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

Member News

By: Jaime Gooch

Welcome and congratulations to the following new members of SLSA.

ACTIVE MEMBERSHIP

Olya Velichko-Olya is a Legal Assistant for the Arnold Law Firm and has been a legal professional for two years. She enjoys reading, baking, cooking, volunteering, and gardening. She celebrates her birthday on June 1.



Happy March Birthdays!

- Patricia Day - March 2
- Elizabeth Madden, CCLS - March 4
- Shannon Kline- March 9
- Cleo Morris - March 13
- Christina Will - March 18
- Helen Wayne - March 20
- Beth Rose - March 20
- Jeanette DeLap - March 21
- Michelle Chavez, CCLS - March 24
- Heidi Cornell - March 29



CONGRATULATIONS



Congratulations to Lynne Prescott, CCLS, and Randy Lopez, who were married in a private ceremony out in the country in Woodland, on February 10, 2019. Lynne knew Randy was a “keeper” when he offered to drive from Yuba City to West Sacramento to help clean her condo when she was moving to a new place. That was their first date and they’ve been inseparable ever since! Randy is the Director of Nursing and Administrator for two private facilities in Yuba City, and is working towards his Nurse Practitioner license. Like Lynne, he is a “karaoke head” and loves to sing. The two make their home in Yuba City with their four feline fur babies: Ossie, Sasha, Rio, and Winnie.

Nominations and Elections

By: Dawn Forgeur, CCLS and Crystal Rivera

At the February dinner meeting, the Nominations and Elections Committee submitted its slate of officers and delegates for the 2019-2020 fiscal year.

ELECTED OFFICERS

President – Brenda Bracy, CCLS

Vice President – Marci Frazier

Secretary – Shannon Kline

Treasurer – Marci Frazier

Governor – Corene Rodder

There were no additional nominations from the floor, and the above-officers were elected by acclamation. No ballots will be mailed out. The incoming officers will be installed at SLSA's April dinner meeting.

ELECTED DELEGATES

Maryanna Rickner

Marci Frazier

Debra Clark

There were no additional nominations for delegate from the floor, and the nominees above were elected by acclamation. No ballots will be mailed out. These delegates will represent SLSA's members at LSI's Annual Conference in May.

The Nominations and Elections Committee congratulates the incoming board and delegates!

EDITOR'S NOTE

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

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

Annual Federal Day in Court

By: Jessica Patton, Day in Court Chair

On February 21, 2019, Sacramento Legal Secretaries Association held its Annual Federal Day in Court Dinner. Featured speakers at our event were Cathy Waltz, Support Specialist, United States Bankruptcy Court, Wim van Rooyen, Career Law Clerk, Eastern District of California, and Magistrate Judge Kendall Newman of the Eastern District of California.



Wim van Rooyen, Magistrate Judge Kendall Newman, Jessica Patton, and Cathy Waltz



Jessica Patton and Terry Olson

This year's event was also held at the Hilton Arden West, our last event before the hotel's big remodel! Be sure to join us for next year's events to see the new remodel.

Magistrate Judge Newman touched on the Eastern District's overwhelming caseload. Currently, there are 6 District Judges, 2 Senior District Judges, 14 Magistrate Judges, and 6 Bankruptcy Judges. Each District Judge handles an average of approximately 900 cases at any given time, more than double the nationwide average caseload for District Judges, which is 425 cases. So, if you are wondering why you have not received a ruling in a civil matter, this could be the reason! Magistrate Judge Newman recommends your attorneys consenting to a magistrate and being patient. Avoid calling the clerks to check on the status of a ruling. Magistrate Judge Newman was very complimentary of not only our Association, but our profession as assistants, legal secretaries, and paralegals here in Sacramento.

Back by popular demand was SLSA's Honorary Member and Career Law Clerk for Magistrate Judge Newman, Wim van Rooyen. Wim highlighted on the Amendments to the Local Rules for the Eastern District. Those red-lined amendments can be accessed on the Court's website, here:

[www.caed.uscourts.gov/caednew/assets/File/GO%20596\(1\).pdf](http://www.caed.uscourts.gov/caednew/assets/File/GO%20596(1).pdf)

Wim reminded us that before calling the Court, remember to check the Judge's Standing Order and your Scheduling Order.

Cathy Waltz, Support Specialist for the U.S. Bankruptcy Court also joined us for her 6th Annual Federal Day in Court dinner. Cathy advised attendees that USBC has gone completely to electronic filing. If you have a preexisting CM/ECF filer login for the Eastern District of California, that login will not work for USBC filings. If you need this process expedited, feel free to contact Cathy directly (cathy_waltz@caeb.uscourts.gov).

Annual Federal Day in Court, cont.

Thank you to my Co-Chair, Terry Olson for your amazing work on the successful Exhibit Gallery!



As usual, our vendors were generous and handed out some great swag! Shoe shine kits! Shoe bags! Candles! Bug-screen! (That's right-bug-screen!) The vendor raffle was also a hit. Winners scored a Kindle Fire Tablet, Firehouse gift card, Target gift cards, Visa gift cards, various other gift cards, and a fluffy blanket. We would like to thank the vendors for their support and their ongoing help. We cannot thank you enough for all that you do for our Association. Please support our vendors!

I would also like to thank Brenda Bracy, CCLS, and Rebecca Lerma for their help with this event. Thank you for all your support! Also, thank you to the amazing Corene Rodder and the Federal DIC Registration Team. Thanks ladies!

Questions regarding Federal Day in Court?
Contact Jessica Patton
Telephone: (916) 448-7888
Email: Jessicap@SDNlaw.com



Thank you to everyone who helped make this event a success!

Annual Federal Day in Court, cont.

OUR VENDORS



Macro-Pro Inc.
Capitol Digital and Calforensics
Aptus Court Reporting
Capitol Legal Investigations, Inc.

U.S. Legal Support
First Legal Depositions
Veritext Legal Solutions
Fujitani Consulting

Law Office Products and Management

By: Gisele Mitsuk

Hello SLSA members! Are you ready for daylight savings time on March 10, 2019? For myself, the answer is both no and yes. I love the extra daylight after the work day is complete. However, being hard-wired as a night owl, I don't love the chaos it creates for my sleep habits! This can be the difference between being well-rested and ready for the day, and experiencing up to 8 hours of "groggy"! But, I shall manage. And if you are a night owl, you too shall find ways to cope. We can do this!

In light of the forthcoming time change disrupting the sleep for some of us, I thought I'd take a few practice pointers I've learned recently and over the years and share them with you, our SLSA members. Perhaps many of you have already deployed these practices. So if you now already use some or all of these practices, I bet you have some up your sleeve that you can share. If you do, *please* email them to me! I'll share them in an upcoming newsletter and give you credit for the submission!

In any event, I hope some of these practice tips might help you get through your work day more efficiently. Especially on the groggy days!

Tip #1 – Create a template folder

Create a folder of forms, pleadings, discovery, status updates/reports and the like. Perhaps you and your attorney recently dialed in a great introduction and definition set for discovery requests. Perhaps those discovery requests are specific to a "slip and fall" personal injury case. Save them! Then later on perhaps you dial in a great set of discovery requests for a "dog bite" PI case. Save them! Maybe another time you have a set of discovery requests that pertain to a wage and hour matter. Save them! What if you created a California state court stipulation and [proposed] order that you like the language and format (header format, signature blocks, judge's signature and date field)? Save it. In the future when you need a stipulation, you can work with the one you have handy in your template folder. NOTE: Try to prevent unnecessary metadata exposure when creating new files with these templates. I recommend only copying the brief's body and pasting that into your document shell created from the master caption of the case you are working on at the moment. This will also eliminate the hassle of changing the caption data, which can result in court-rejectionable errors when rushed.

Tip #2 – File naming conventions

Back in the early years of computers we could only use eight characters for a file name. Remember those *extremely limiting* times? The groan you'd let out when the computer told you the name could not be used "again"? What do you mean "again"? I don't recall using this name? *Puzzled look* Well, now we can have as many as 255 characters in a file name, and the total path length can be almost as much as 32,000 characters. However, you should limit path lengths to 260 characters or less. This leads me to...

Decide upon a master format for file names. When it comes to pleadings and discovery, I like to name my files by DATE, PARTY, then by brief NAME. For correspondence, I like to name my files by DATE, Ltr to/from LAST NAME, re SUBJECT. Whether you have iManage, Worldox, store files on a shared drive, or use some other form of document management, this can be a true time saver. Often we want to see files listed in a folder, in chronological order. It can be much easier to search for pleadings that were filed after a particular time period or review letters in the sequence they arrived/went out.

I highly recommend starting the name of all files with their date in ISO 8601 format, YYYY-MM-DD format. You never know when someone might need to (or accidentally) change a file, and then the "Date modified" (for PC users) changes from the original date in 2016 to today. Now you can't effectively search by "date" unless your files are named with date leading off the file name.

Law Office Products and Management, cont.

Note that the majority of Americans use civilian vernacular date format, MM-DD-YYYY. If you notice, when using MM-DD-YYYY format, this causes a folder that spans multiple years to not be continuous in chronological order. Instead, it bulks files into the same month, but intermingles the years. Sorting this out can be circumvented with document management systems, but many small and mid-sized firms still use shared drives and this is where it really counts. Here are some hypothetical examples of file names:

PLEADINGS

- 2019-01-19 DUCK CM Stmt for 2-4-2019 CMC.pdf
- 2019-01-19 WALT DISNEY CM Stmt for 2-4-2019 CMC.pdf
- 2019-01-22 PLUTO CM Stmt for 2-4-2019 CMC.pdf
- 2019-02-04 COURT Tentative Ruling re CMC.pdf

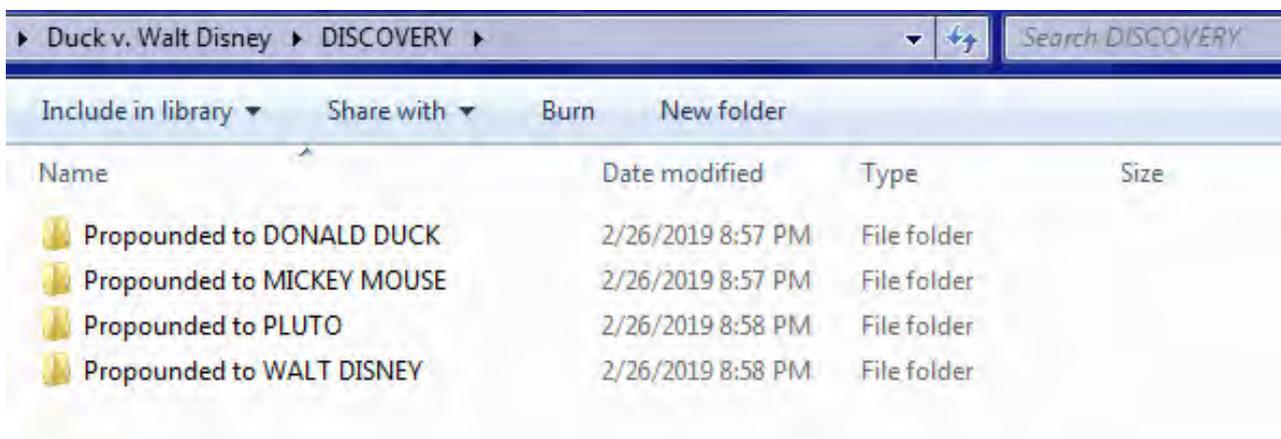
CORRESPONDENCE

- 2018-12-20 Ltr to Mork re meet and confer.docx
- 2018-12-21 Ltr from Mork re December 20 letter.pdf
- 2019-01-16 Ltr to ALL COUNSEL re selection of neutral.docx

Tip #3 – Sort your Discovery Files with Sub-folders

Have you opened up a discovery folder on the computer and found yourself boggled with the disorganization? And someone wants you to find the response to request for production which contained photographs of the matter at hand? And that someone is in a rush on a deposition break? And it's not even your case? Well, if you can set up your files to be in sub-folders, you'll save yourself and others some time. Here's a sample of sub-folders, continuing with the Donald Duck, Mickey Mouse, and Pluto theme above.

- Main folder > Sub-folder > Sub-folder
- Duck v. Walt Disney > DISCOVERY > Propounded to DONALD DUCK
- Duck v. Walt Disney > DISCOVERY > Propounded to MICKEY MOUSE
- Duck v. Walt Disney > DISCOVERY > Propounded to PLUTO
- Duck v. Walt Disney > DISCOVERY > Propounded to WALT DISNEY



Law Office Products and Management, cont.

Within those sub-folders, you can have very short, concise and coherent file names. Such as for the sub-folder Propounded to MICKEY MOUSE:

- 2018-11-20 Walt Disney FROG.S1.pdf
- 2018-11-20 Walt Disney RFA.S1.pdf
- 2018-11-20 Walt Disney RPD.S1.pdf
- 2018-11-20 Walt Disney SpROG.S1.pdf
- 2018-12-26 Resp to Walt Disney FROG.S1.pdf
- 2018-12-26 Resp to Walt Disney RFA.S1.pdf
- 2018-12-26 Resp to Walt Disney RPD.S1.pdf
- 2018-12-26 Resp to Walt Disney SpROG.S1.pdf
- 2019-02-20 Walt Disney RPD.S2.pdf

FROG stands for "Form Interrogatories." RFA = Requests for Admission. RPD = Request for Production. SpROG = Special Interrogatories. The "S1" = Set One.

See how this can make things easier for finding files on the computer? It may take a while to change your entire folder and file names to a helpful format for you. However, there's no need to tackle them all at once. Just start chipping away by tackling the folder you just dived into. Rename a few files, or all of them in that specific folder/sub-folder. If you use keyboard shortcuts, you could rename 40 files in 20 minutes or less. And that's if the files are completely inconsistent with naming conventions. If they already follow a fairly easy to read format, it could take you just 3-5 minutes.

If you are anything like me, the newfound organization and ease of use will cause you to beam a smile that can be seen from outer space! Or perhaps from your boss's office... which could lead to good things like praise, contagious happiness, maybe a raise, who knows! It can certainly make finding and creating new files much faster. And who doesn't love spending less time and effort on tasks?!

Looking ahead... I'm open to your input as to what should be included in Law Office Products and 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"!

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California Certified Legal Secretary

By: Elizabeth Madden, CCLS

TRUE OR FALSE?

The following terms should be hyphenated unless they appear in quoted matter and were not hyphenated in the original.
California Style Manual §§ 4:43-4:44

- _____ 1. above-described
- _____ 2. attorney-client relationship
- _____ 3. blood-alcohol level
- _____ 4. case-in-chief
- _____ 5. case-law
- _____ 6. co-counsel
- _____ 7. co-workers

- _____ 8. court-appointed
- _____ 9. I-beam
- _____ 10. mid-term
- _____ 11. parent-child relationship
- _____ 12. re-examine
- _____ 13. tape-recorded
- _____ 14. well-being
- _____ 15. work-product

antebellum
before the war

caveat
let him beware; warning

dictum
an authoritative statement

fiat
sanction

ibid.
in the same place

ipso facto
by the fact itself

prima facie
on the face of it

quid pro quo
something for something

res ipsa loquitur
the thing speaks for itself

sua sponte
on one's own initiative



1. F; 2. T; 3. T (adj.); 4. T; 5. F; 6. F (one word); 7. F (one word); 8. T (adj.); 9. T; 10. F (one word); 11. T; 12. F (one word); 13. T (adj.); 14. T; 15. F



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Email: lsiwebinar@lsi.org

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Legal Secretaries, Incorporated
85th Annual Conference



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POSTMARKED ON OR BEFORE APRIL 15, 2019 _____@ \$137.00 \$ _____
 POSTMARKED ON OR AFTER APRIL 16, 2019 _____@ \$147.00 \$ _____

INDIVIDUAL TICKETS:

Registration On Or Before April 15, 2019 _____@ \$25.00 \$ _____
 Registration On Or After April 16, 2019 _____@ \$35.00 \$ _____
 Welcome Reception (Friday) _____@ \$25.00 \$ _____
 *Governors Luncheon (Friday) _____@ \$33.00 \$ _____
 *Presidents Luncheon (Friday) _____@ \$33.00 \$ _____
 *Open-Newcomers Luncheon (Friday) _____@ \$33.00 \$ _____
 *Kalman S. Zempleny II CCLS Luncheon (Saturday) _____@ \$33.00 \$ _____
 * Roast Beef on a Steak Sandwich Roll Chicken on a Baguette Vegetarian Wrap
 and * Soup or Salad
 Banquet (Saturday): _____@ \$63.00 \$ _____
 Beef Chicken Vegetarian
 Brunch (Sunday) _____@ \$30.00 \$ _____
 TOTAL AMOUNT \$ _____

Special Dietary Request (Including vegetarian): _____

MAKE CHECKS PAYABLE TO: Alameda County LSA Conference Fund
 SEND TO: Winnie Owen, 522 Carmel Avenue, Albany, CA 94706
 QUESTIONS: Cyndee Saucedo, Conference Chair, csauceda@meyersnave.com or 510-910-7167

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May 17 & 18, 2019

REGISTER BY MAY 10
Section Member - Free | All others - \$15

FRI, MAY 17 1:30PM - 3:30PM

Law Office Administration

Neutral Workplace Investigations

Jeanine DeBacker, Esq.
McPharlin Sprinkles & Thomas LLP

Civil Law

Litigation & California Wildfires and/or Mudslides

Kristine Meredith, Esq.
Danko Meredith

FRI, MAY 17 4:00PM - 6:00PM

Criminal and Family Law

**International Jurisdictional Issues With Regard to
Custody Litigation**

Gary Dubrovsky, Esq. and Rosie Reith, Esq.

Specialty Law

**CEQA: Litigation and the Administrative Record
for Legal Secretaries and Paralegals**

Cheron McAleece

SAT, MAY 18 4:00PM - 6:00PM

Federal Law

TBD

Lauren Gallo White, Esq.
Wilson Sonsini Goodrich & Rosati

Probate and Estate Planning

Charitable Gift and Trust Planning

Ryan W. Lockhart, Esq.
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A Program of LSI®



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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.
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On Time Registration Fee \$ 25.00	On Time Registration Fee \$ 75.00	
Examination Fee* 100.00	Examination Fee* 100.00	
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TOTAL DUE w/o Late Fee: \$125.00	TOTAL DUE w/o Late Fee: \$175.00	

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Employment Information

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

Position: _____ Dates of Employment: _____

Employer: _____
(name and address)

Supervisor: _____ Supervisor's Phone: _____

Supervisor's Email: _____

Summary of Duties: _____

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

Date: _____

Applicant Signature

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

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