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**President**

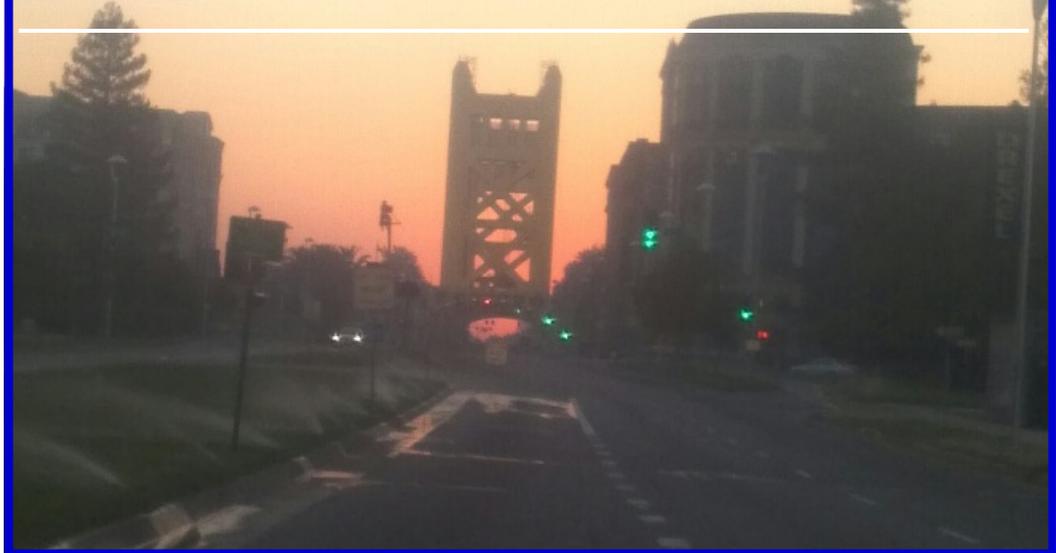
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**Sacramento Legal Secretaries Association**

**THE LEGAL EAGLE**



**August Event(s)**

- **August Regular Dinner Meeting – August 16.** This meeting will be held at the Courtyard Marriott - Midtown Sacramento, 4422 Y Street, Sacramento. You can register online through our website ([www.slsa.org](http://www.slsa.org)) or contact Shelly Reyes at [reservations@slsa.org](mailto:reservations@slsa.org). *See page 27.*

**Mission Statement**

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

**NON-MEMBERS ARE WELCOME!**





Dawn Forgeur, CCLS

# President's Message

by Dawn Forgeur, CCLS

Summer is finally here! I hope everyone is having a great couple of months and getting to take a couple of vacation days to relax.

In July, SLSA added approximately 25 new members to its membership! I hope to see some of these new members at our dinner or lunch meetings and take advantage of some of the educational opportunities that your SLSA Chairmen are working at providing everyone.

August's dinner meeting guest speaker is June Coleman, Esq. who is the current President of the Sacramento County Bar Association ("SCBA"). I've asked her to speak to us about the current happenings with the SCBA and also about her personal practice, which involves the Fair Debt Collection Practices Act and the Fair Credit Reporting Act.

Thank you to the dinner meeting attendees who have filled out the yellow cards, your suggestions for future presentations and seminars,



Your feedback helps us know what topics are of interest to you, the members – if you don't tell us, we don't know! ~Dawn Forgeur, CCLS



July's dinner meeting guest speaker was Judge Russell Hom from Sacramento Superior Court. Judge Hom spoke to attendees regarding expedited jury trials. You can read a short recap of his presentation in this bulletin. Thank you to Judge Hom for taking time to visit with SLSA!

and thank you to those who complete the activity evaluation forms that we provide each dinner meeting. Your feedback helps us know what topics are of interest to you, the members – if you don't tell us, we don't know!

Anne French and her team worked to put together a great lunch lesson on Citations! It was held on July 31, 2012, at Downey Brand's office and the speaker was attorney Lauren Yip who spoke on the CA Style Manual format. Please see the article and pictures in this bulletin.



## CHANGE OF ADDRESS:

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



# Professionalism During Meetings

by *SLSA Executive Board*

Sometimes, we all need a reminder of our ethical obligations. Our dinner meetings are a professional, as well as a social, gathering, and consist of your peers who are also legal professionals in the Sacramento area. As everyone should know, Sacramento is a small community and the legal community is even smaller. Everyone knows somebody who knows you.

With that in mind, please be aware of what you are saying and talking about to each other at the dinner meetings, or any meeting that you are attending. In SLSA's mission statement, it lets members know that SLSA is committed to promoting a high standard of ethics to our members. In fact, when you become a member of SLSA you pledge to:

“...observe all laws, rules, and regulations now or hereafter in effect relating to confidentiality and privileged communication, acting with loyalty, integrity, competence, and diplomacy in accordance with the highest standard of professional conduct.”

We remind you of this obligation because it is an additional area of confidentiality outside of the daily interactions and workings of the law office, and an area that was not discussed in our ethics

presentation. We are always held to a higher standard just by virtue of our profession. SLSA meetings, LSI conferences, Beginning Legal Secretary classes, Lunch Lessons, or any professional or social event where you may be in discussions about your job or office fall under the Rules of Professional Conduct and should be regarded as such.

The Executive Board is immensely proud of SLSA and its members, and we are honored to serve the members of this association. SLSA has a long and well-respected place in our legal community, and enjoys a reputation for promoting the education and professionalism of its members. You are key to ensuring the continuation of that fine tradition. Thank you for your contributions and commitment to promoting the highest standards of excellence, education, ethics, professional conduct, and integrity.

## Of Note

In the Members Only section of the SLSA website, we have added a Benefits page so that you may easily find any current benefits available to members.

The last day to register to vote for the November Presidential Election is October 22, 2012.

As of July 1, 2012, there were several new and revised Judicial Council forms. We have listed only a few of the new or revised forms below. For a complete list, please see [www.courts.ca.gov/3020.htm](http://www.courts.ca.gov/3020.htm).

### Alternative Dispute Resolution

Revised: ADR-100 Statement of Agreement or Nonagreement

### Family Law

New: FL-107-INFO Legal Steps for a Divorce

Revised: FL-115 Proof of Service of Summons

Revised: FL-180 Judgment

Revised: FL-341 Child Custody and Visitation Order Attachment

Revised: FL-343 Spousal, Partner, or Family Support Order Attachment

### Miscellaneous

New: MC-003 Juror Questionnaire for Expedited Jury Trials

New: MC-361 Petition to Establish Fact, Time, and Place of Birth

New: MC-362 Petition to Establish Fact, Date, and Place of Marriage



# July Membership Chair Report

by Lynne Koroush

*Welcome, and congratulations to the following new SLSA members, who were inducted at the June 21, 2012 regular membership meeting.*

## ACTIVE MEMBERSHIP

- **Susan Hryekewicz** -- Susan is a paralegal at Farmer, Smith & Lane, and has worked as a legal professional since 2008. She specializes in insurance law. Susan celebrates her birthday on August 13, and enjoys hiking, cooking, and traveling with her family.
- **Margie Fair** -- Margie is a legal secretary with Dreyer Babich, and has worked as a legal professional since 1996. She specializes in litigation. Margie celebrates her birthday on December 19.
- **Ana Marie Sotuela** -- Ana Marie is a legal secretary/paralegal with The Saqui Law Group and has worked as a legal professional since 2004. She specializes in litigation and labor & employment. Ana Marie celebrates her birthday on September 29.
- **Valeri Davis** -- Valeri is a legal secretary at the office of Low McKinley Baleria, LLP, and has worked as a legal professional since 2002. She specializes in litigation. Valeri celebrates her birthday on February 10, and enjoys gardening and hiking.
- **Donna Anderson** -- Donna is self-employed as a legal assistant and accountant, and has been in the legal field since 1994. She specializes in law office management, real estate and tax law. Donna celebrates her birthday on October 29, and enjoys sports, skiing, hiking, and gardening.
- **Robin Blackwell** -- Robin is a legal secretary with Lozano Smith, and has worked as a legal professional since 2009. She specializes in educational law. Robin enjoys traveling and reading, and celebrates her birthday on August 12.
- **Nicole Burton** -- Nicole is a paralegal for the law office of Clifford B. Scheyer and has been a legal professional since 1999. She specializes in administrative law, bankruptcy, and real estate law. Nicole celebrates her birthday on March 31, and enjoys reading, swimming, and painting.
- **Marie Coleman** -- Marie is a legal secretary with Boutin Jones, and has been employed as a legal professional since 1988. She specializes in litigation. Marie celebrates her birthday on November 5, and enjoys Polynesian dancing, movies, and spending time with family.
- **Sarah Hill** -- Sarah is a legal secretary at Downey Brand, and has been a legal professional since 2000. She specializes in litigation. Sarah celebrates her birthday on May 26.
- **Alisa Johnson** -- Alisa is a legal staff assistant with the Sacramento City Attorney's Office, and has been a legal professional since January 2011. She specializes in law office management. Alisa enjoys traveling, and celebrates her birthday on April 3.
- **Joshika "Jenni" Kuar** -- Jenni is a legal secretary with Sutter Health, and has been employed as a legal professional since 2009. She specializes in employment law. Jenni is interested in computers, and celebrates her birthday on February 8.
- **Maryann McCandless** -- Maryann is an office services clerk with Stoel Rives, and has been employed as a legal professional since 2008. She enjoys gardening, cooking and scrapbooking, and celebrates her birthday on December 29.
- **Tiffany McGill** - Tiffany is a risk management assistant with Downey Brand and has been employed in the legal field for many years. She enjoys, cooking, baking, and decorating, and celebrates her birthday on September 13.
- **Shawn Prentiss** -- Shawn is a legal secretary with Downey Brand and has been a legal professional for 25 years. She specializes in water and environment mining law. Shawn celebrates her birthday on September 29, and enjoys gardening, swimming, and cooking.
- **Nicole Scruggs** -- Nicole is a risk management clerk at Downey Brand and has been a legal professional since 2006. She celebrates her birthday on August 2, and enjoys soccer, running, cooking, and photography.

# July Membership Chair Report (cont.)

by Lynne Koroush

- **Angelique Toro** -- Angelique is a legal secretary with Kronick Moskowitz and has been employed as a legal professional since 2003. She specializes in business/corporate law, litigation, and education law. Angelique enjoys salsa dancing and soccer, and celebrates her birthday on March 12.
- **Evelyn Solorzano** -- Evelyn is a legal clerk with Financial Pacific Insurance Company and has been a legal professional since January 2011. She specializes in construction defect law. Evelyn celebrates her birthday on February 16.
- **Linda Schrimsher** -- Linda is the confidential administrative assistant to the general counsel for the San Juan Unified School District, and has been employed as a legal professional since 2010. She specializes in educational law. Linda enjoys camping, has been a corporate trainer, and celebrates her birthday on December 6.
- **Nadezhda Tiskiy** -- Nadezhda is a legal secretary with the law office of Clifford Scherer, and has been employed as a legal professional since March 2010. She specializes in administrative and bankruptcy law. Nadezhda enjoys snowboarding, swimming, baking, and taking road trips. She celebrates her birthday on November 4.

## STUDENT MEMBERSHIP

- **Terri Adams** -- Terri is an e-discovery assistant with Sutter Health, and has been working as a legal professional since February 2012. She specializes in litigation, e-discovery, business and corporate law. Terri celebrates her birthday on December 9. She will be eligible for active membership in February 2013.
- **Melinda Eberwein** -- Melinda is a legal secretary with Sutter Health, and has been employed as a legal professional for the last five months. She specializes in employment law. Melinda celebrates her birthday on March 20, and enjoys shopping and her dogs. She will be eligible for active membership in January 2013.
- **Jessica Patton** -- Jessica is a receptionist at the Law Office of Spinelli, Donald & Nott, and has been employed in the legal field for one month. She enjoys tennis and golf, and celebrates her birthday on May 27.

## ASSOCIATE MEMBERSHIP

- **Victoria Hull** -- Victoria is a BLS student who previously worked as a legal assistant from 1993 to 2006. She presently does not list an employer. She has experience in administrative law, bankruptcy, family law, law office management, probate/estate planning, and real estate law. Victoria celebrates her birthday on June 8.
- **Bella Babasyan** -- Bella is a BLS student, employed by American River College, who is interested in the legal profession. She celebrates her birthday on February 6, and would like to study immigration law.
- **Jessica Equihua** -- Jessica is a BLS student who is presently employed as an executive assistant with the City of Sacramento, and is interested in entering the legal profession. She celebrates her birthday on August 30.

*If you are interested in membership in SLSA, please contact Lynne Koroush at (916) 442-1111, or via e-mail at [koroush1@glaw.com](mailto:koroush1@glaw.com).*

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### ***Congratulations!!***

To **SLSA's Secretary, Deseree Gamayo**, who is expecting a bundle of joy right around Christmas! SLSA wishes you all the best for a smooth delivery and a beautiful, healthy baby!

### ***On the Move!!***

Congratulations to **Sophia Albov, CCLS**, who is moving to Montana to pursue a Master's degree in geography! Best of luck to you, Sophia, and remember to keep in touch with your SLSA buddies!

# August Membership Chair Report

by Lynne Koroush

*Welcome, and congratulations to the following new SLSA members, who were inducted at the July 19, 2012 regular membership meeting.*

## ACTIVE MEMBERSHIP

**Serena Albaeck** -- Serena is a legal secretary with Diepenbrock Elkin LLP, and has worked as a legal professional since 2000. She specializes in insurance litigation. Serena celebrates her birthday on December 14, and enjoys playing softball, singing karaoke, and going to the ocean.

**Margarita Jokovas** -- Margarita is a legal secretary with Diepenbrock Elkin, LLP, and has worked as a legal professional since 1990. She specializes in construction litigation. Margarita celebrates her birthday on August 29.

**Jennifer Sullivan** -- Jennifer is employed as a legal secretary with Matheny Sears, et al., and has worked as a legal professional since 2009. She specializes in litigation and personal injury. Jennifer celebrates her birthday on September 27, and enjoys art.

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

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## ***Congratulations!!***

To SLSA's Vice President, **Lynne (Gomes) Koroush**. Lynne married Kevin Koroush in a Roaring 20s outdoor ceremony on Lake Washington in Kirkland, WA, on July 7, 2012. Mr. and Mrs. Koroush make their home in Sacramento, and are very pleased to share their happiness with the members of SLSA!



## CHANGES?? UPDATES??

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

# Making a Difference by Mentoring

by Maryanna Rickner

At some point in our careers, many of us wonder how we can give back by becoming involved in our community. The across-the-board cuts over the past few years to California's budget, which have included the legal and education systems, have increased the importance of the civic duty each one of us has in reducing the impact.

My calling came last year when I decided to volunteer in the LINKS Mentoring Program as a mentor to high school students who are at risk of not graduating for various reasons (e.g., failing grades, lack of skills, life's challenges). The program is facilitated by staff from the Sacramento County Office of Education and provides mentors to several school sites in the Sacramento area for students in grades 7-12. It is designed to help students improve their academic performance, attendance and social skills by matching them with a positive adult role model. The following is some insight from my experience last year on how the program works.

After meeting the program requirements, attending an interview/orientation meeting and participating in a brief mentor training, I began mentoring my assigned protégé once a week at a school that participates in the program. This, of course, required my attorney's approval, along with the flexibility to adjust my work schedule so I could leave an hour early on the mentoring days.

A program staff member facilitated each one-hour mentoring session that included providing organized activities, materials and support. This made it easy to understand the tasks and goals for the session, and provided me with a resource for any issues with my protégé that were above and beyond my knowledge or experience base.

It took a few weeks of mentoring before my protégé started to feel comfortable with my role as their mentor. Over time, I demonstrated my commitment to them by routinely attending the sessions, and showing interest for their well-being by ensuring that they attended and participated in each session. During the times when they felt they were failing, I provided the encouragement for them to keep trying and not

give up. When they felt alone and thought that no one understood or they were making bad decisions that could result in potentially negative consequences, I discussed the issues with them to help them figure out their own options for handling the problems in a positive way.

There were days when I doubted that I was successful in getting the message of the session through to them. The blank looks, the crooked smiles with raised eyebrows that I interpreted as "you're crazy," and moments of unresponsive silence would make anyone doubt their effectiveness as a communicator. I hung in there on the "not so good days" though – and later I was glad I did.

Following the first semester of school, my protégé earned the credits to graduate from high school.

I continued my support by later attending their graduation ceremony. It felt great to know that the LINKS Mentoring Program, along with my participation, had helped this student to not only graduate, but also provided them with some essential life skills (e.g., balancing a check book, filling out a FASFA application, creating a budget) they would need to continue moving forward in their life. **This is how I made a difference** – and will continue to do so this upcoming school year – **by mentoring.**

If you are interested in volunteering or have questions regarding the LINKS Mentoring Program, please contact Ryan Miranda at (916) 228-2412 or Lindsay Cathcart at (916) 228-2565. Information is also available at [www.scoe.net/links/mentoring](http://www.scoe.net/links/mentoring).



Maryanna Rickner



# Employment Report/Positions Available

by Jaymie Moralez



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

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

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

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

- (8/10/12) Experienced Paralegal. Stoel Rives LLP seeks an experienced paralegal to join its Sacramento office to work in the litigation practice group. Candidate must have a minimum of five years' experience in complex litigation, a working knowledge of litigation specific issues and software (e.g., civil procedure, Concordance, CaseMap, ReallLegal Binder, etc.) and large database and electronic document management experience. The successful candidate will be organized, self-motivated, have working knowledge of state and federal court rules and practice, be a team player, and possess excellent written and verbal communication skills. Ideal candidate will have experience supporting attorneys at trial. Occasional travel may be required. Include cover letter and three references with resume. EEO/AA. Please apply online at our website: [http://www.stoel.com/admin\\_openings.htm](http://www.stoel.com/admin_openings.htm).
- (08/03/2012) Legal Secretary. Downey Brand LLP, Sacramento's largest law firm, seeks a Litigation Secretary for its Downtown Sacramento office. Candidates must have significant (5+ years) experience in a litigation environment, and have thorough knowledge of federal and state court procedures and timelines. Requires 75+ wpm accurate typing, word processing and proficiency with MS Office applications. Ability to accurately proofread documents, set priorities and work under pressure is critical. Must have a positive attitude, strong written and verbal communication skills, impeccable attendance and punctuality, a strong work ethic, and be highly organized with an extreme level of attention to detail. Salary commensurate with experience, and firm-paid health benefits and parking are provided. Qualified applicants may submit a cover letter and resume in confidence to Camilla Arnds, Human Resources Director, via the firm's web application: [https://lawcruit.micronapps.com/sup/v3/lc\\_supp\\_app\\_frm.aspx?lawfirm=169&id=9](https://lawcruit.micronapps.com/sup/v3/lc_supp_app_frm.aspx?lawfirm=169&id=9). No telephone calls please.
- (7/26/12) Legal Assistant/Secretary. El Dorado County firm with active estate planning, probate and conservatorship practice has immediate need for an experienced, full time legal assistant/secretary. The position requires excellent computer skills, ability to organize and manage a busy case load, attention to detail, and strong writing skills. Professional, friendly demeanor also necessary for regular client contact. 3 or more years experience as legal assistant or legal secretary is preferred. Wordperfect, Word, Excel, Acrobat proficiency required. Compensation depends on experience. Please email cover letter and resume to [admin@guthrieandellerman.com](mailto:admin@guthrieandellerman.com).

## Employment Report/Positions Available (cont.)

by Jaymie Morales

- (7/25/12) Tariff Paralegal. Folsom's California ISO location is hiring for a Tariff Paralegal. The Tariff Paralegal position responds to various legal and non-legal research and documentation requests from California ISO attorneys. The paralegal has primary responsibility for maintaining the ISO tariff and assisting attorneys with tariff-related filings and projects. To apply for this job or to get more information, please go to <http://www.caiso.com/about/Pages/Careers/default.aspx>.
- (6/28/12) Legal Secretary. Sole practice Plaintiff attorney seeks full time legal secretary. High character, excellent typing and computer skills are a must. 1-3 years legal experience preferred, but not required. Applicant must be motivated and have high work performance standards. Excellent people skills required. Spanish language is a plus. Beautiful office with water landscaping on University Ave. Professional, friendly work atmosphere. Free and plentiful parking. Salary DOE. Retirement, vacation and health benefits available. Please send cover letter describing your experience and career goals with your resume to [NambaLaw@aol.com](mailto:NambaLaw@aol.com).



## Congratulations!!

SLSA recently celebrated with Liz Gideon, CCLS, on successfully passing the California Certified Legal Secretary ("CCLS") exam and attaining CCLS status. At the June 21, 2012, regular membership meeting, SLSA President Dawn Forgeur, CCLS, and Vice President, Lynne Koroush, had the pleasure of presenting Liz with her CCLS certificate from LSI, and a gold CCLS pin as a special gift from the members of SLSA in recognition of her outstanding achievement. Congratulations, Liz!



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

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

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

NAME OF APPLICANT \_\_\_\_\_  
EMPLOYER \_\_\_\_\_ POSITION \_\_\_\_\_  
MAILING ADDRESS \_\_\_\_\_ CITY/ZIP \_\_\_\_\_  
BUSINESS TELEPHONE (\_\_\_\_) \_\_\_\_\_ RESIDENCE TELEPHONE (\_\_\_\_) \_\_\_\_\_  
BUSINESS E-MAIL \_\_\_\_\_ RESIDENCE E-MAIL \_\_\_\_\_  
EMPLOYMENT IN THE LEGAL FIELD (INCLUDE POSITIONS, DATES) \_\_\_\_\_  
\_\_\_\_\_  
PREVIOUS MEMBERSHIP IN A LEGAL SECRETARIES ASSOCIATION (INCLUDE ASSOCIATIONS, DATES) \_\_\_\_\_  
\_\_\_\_\_

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

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

SIGNATURE OF APPLICANT \_\_\_\_\_ DATE \_\_\_\_\_  
SPONSOR \_\_\_\_\_ APPLICATION APPROVED \_\_\_\_\_

**~ ~ LSI LEGAL SPECIALIZATION SECTIONS MEMBERSHIP ~ ~**

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

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

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

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

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

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

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

SLSA and LSI MEMBERSHIP APPLICATION (continued)

Name: \_\_\_\_\_ Birthday \_\_\_\_\_

Talents, Interests, Hobbies: \_\_\_\_\_

**YOUR SPECIALTY:**

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

**EDUCATION:**

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

**TYPE OF OFFICE:**

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

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

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

CHECK HERE IF YOUR EMPLOYER PAYS FOR YOUR MEMBERSHIP DUES

CHECK HERE IF YOUR EMPLOYER PAYS FOR MONTHLY DINNER MEETINGS

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

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

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

How did you hear about SLSA? \_\_\_\_\_

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

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



**Sacramento Legal Secretaries Association  
Membership Renewal Invoice**

**Membership Period: May 1, 2012 – April 30, 2013  
Due Date: May 1, 2012**

Make check payable to:  
**Sacramento Legal Secretaries Association**

Amount Due: **\$40**  
Renewals are due May 1, 2012.  
There will be a late fee of \$5 after June 1, 2012.

Return the completed invoice and full payment to:  
**Deseree Gamayo, Treasurer  
Sacramento Legal Secretaries Association  
c/o Stone & Graves  
11335 Gold Express Dr., Suite 145  
Gold River, CA 95670**

**MEMBER INFORMATION (PLEASE PRINT LEGIBLY):**

**NAME:** \_\_\_\_\_

**BIRTHDAY:** \_\_\_\_\_

**TITLE:** \_\_\_\_\_

**EMPLOYER:** \_\_\_\_\_

**BUSINESS ADDRESS:** \_\_\_\_\_

**CITY, STATE & ZIP:** \_\_\_\_\_

**BUSINESS PHONE:** \_\_\_\_\_

**BUSINESS FAX:** \_\_\_\_\_

**BUSINESS E-MAIL:** \_\_\_\_\_ (for vital updates/reminders)

**RESIDENCE ADDRESS:** \_\_\_\_\_

**CITY, STATE & ZIP:** \_\_\_\_\_

**RESIDENCE PHONE:** \_\_\_\_\_

**RESIDENCE E-MAIL:** \_\_\_\_\_ (for vital updates/reminders)

**YOUR SPECIALTY:**

- |                                                  |                                               |                                                |
|--------------------------------------------------|-----------------------------------------------|------------------------------------------------|
| <input type="checkbox"/> Administrative Law      | <input type="checkbox"/> Appellate Law        | <input type="checkbox"/> Bankruptcy            |
| <input type="checkbox"/> Corporate Law           | <input type="checkbox"/> Criminal Law         | <input type="checkbox"/> Environmental         |
| <input type="checkbox"/> Family Law              | <input type="checkbox"/> Labor and Employment | <input type="checkbox"/> Law Office Management |
| <input type="checkbox"/> Legal Support           | <input type="checkbox"/> Litigation           | <input type="checkbox"/> Personal Injury       |
| <input type="checkbox"/> Probate/Estate Planning | <input type="checkbox"/> Real Estate          | <input type="checkbox"/> Other: _____          |

**MAILING/LISTING INFORMATION:**

- |                                                                       |                                            |                                    |
|-----------------------------------------------------------------------|--------------------------------------------|------------------------------------|
| Where do you want your SLSA/LSI mail delivered?                       | <input type="checkbox"/> Business          | <input type="checkbox"/> Residence |
| Where do you want e-mail delivered?                                   | <input type="checkbox"/> Business          | <input type="checkbox"/> Residence |
| Which address should be listed in the membership roster?              | <input type="checkbox"/> Business          | <input type="checkbox"/> Residence |
| If you do NOT want to be listed in the membership roster, check here: | <input type="checkbox"/> No roster listing |                                    |

**INVOLVEMENT:**

- Have you been awarded lifetime membership in SLSA? (If yes, return form only w/out dues)     Yes     No
- Are you interested in volunteering as a committee chairperson or co-chairperson?     Yes     No
- What topics and speakers would benefit you most this coming year? \_\_\_\_\_

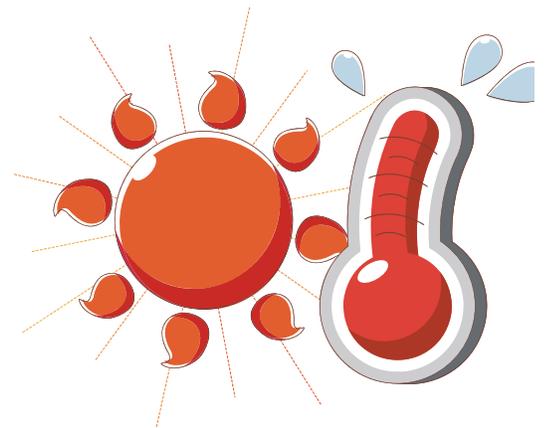
<b>SLSA USE ONLY</b>	Date Received: _____	On Roster: _____
	Check no.: _____	On LSI: _____
	On Email List: _____	To Editor: _____

# August 2012

Sun	Mon	Tue	Wed	Thu	Fri	Sat
			1	2	3	4
5	6 <i>SLSA Executive Board Meeting</i>	7	8	9	10	11
12	13	14	15	16 <i>SLSA Regular Dinner Meeting</i>	17 <i>LSI Quarterly Conference</i>	18 <i>LSI Quarterly Conference</i>
19 <i>LSI Quarterly Conference</i>	20 <i>Last Day to Submit Article for Legal Eagle</i>	21	22	23	24	25
26	27	28	29	30	31	

## Dates to Remember

- **July 9 - SLSA Executive Board Meeting**  
*(Location: Stool Rives - Time: 6:00 p.m.)*
- **July 19 - Regular Dinner Meeting** *(Location: Courtyard Marriott—Midtown, 4422 Y Street, Sacramento, CA, 5:30 p.m.)*
- **July 23 - Last Day to Submit Articles for the August issue of The Legal Eagle**
- **August 6 - SLSA Executive Board Meeting**  
*(Location: Stool Rives - Time: 6:00 p.m.)*
- **August 16 - Regular Dinner Meeting**  
*(Location: Courtyard Marriott—Midtown, 4422 Y Street, Sacramento, CA, 5:30 p.m.)*
- **August 17-19 - LSI Quarterly Conference**  
*(Location: Hilton Pleasanton at the Club, Pleasanton, CA)*
- **August 20 - Last Day to Submit Articles for the September issue of The Legal Eagle**
- **September 10 - SLSA Executive Board Meeting** *(Location: Stool Rives - Time: 6:00 p.m.)*
- **September 20 - Regular Dinner Meeting**  
*(Location: Courtyard Marriott—Midtown, 4422 Y Street, Sacramento, CA, 5:30 p.m.)*
- **September 24 - Last Day to Submit Articles for the October issue of The Legal Eagle**

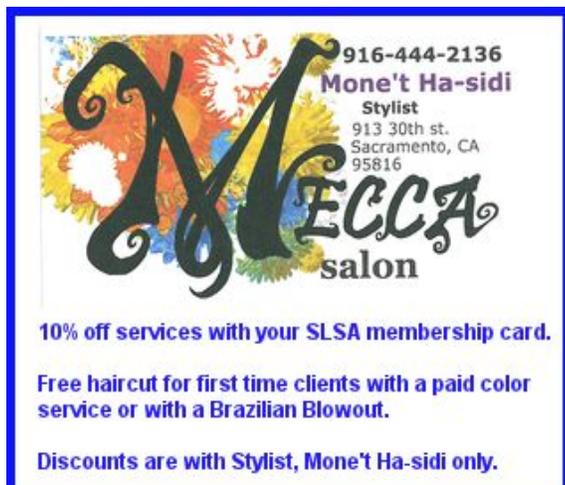


## Benefit Highlights

**S**acramento LSA is pleased to offer its members another new benefit! Mone't Ha-Sidi is a fabulous stylist at Mecca Salon. Ms. Ha-Sidi trained at Elite Cosmetology and is continuously updating her skills by attending cut and color courses at Vidal Sassoon, Toni & Guy, and Bumble and Bumble. She is highly skilled in color services, hair extensions, make-up artistry, and Brazilian blowouts.

Mone't is offering SLSA members a free haircut for first-time clients with a paid color service or with a Brazilian blowout. Ms. Ha-Sidi is also offering members 10% off of regular services with your SLSA membership card! These offers are not available from any other stylist at Mecca Salon. If you would like to reach Mone't, you may call 916-444-2136 to schedule your appointment!

If you know of a local vendor who would like to offer SLSA members a benefit, please let us know!



## CAPs

by Melanie Herman

**S**LSA's goal for 2012-2013 is 75,000! And we are well on our way at a total of 25,830, as of July 24, 2012, leaving only 49,170 more to go! So if you attend LSI's conference and/or any of the LSS seminars, let us know! Help us capture CAPs and reach our goal. E-mail Melanie and let her know that you earned SLSA points – don't make her harass you. Her e-mail is mherman@perkins-lawoffice.com. \*\*See the Chapter Achievement Reporting Form in this bullet for more ways to gain points\*\*

## CCLS Quiz

by Launa Atkinson, CCLS

True or False

- Non-expert discovery cutoff is 30 days before the initial trial date.  
\_\_\_ True \_\_\_ False
- If the discovery cutoff dates fall on a Saturday, Sunday, or holiday, the last day shall be the next court day closer to the trial date.  
\_\_\_ True \_\_\_ False
- A nonparty witness is not entitled to a witness fee or mileage for appearing at trial.  
\_\_\_ True \_\_\_ False
- Advance jury fees must be deposited with the court 25 days prior to the initial trial date.  
\_\_\_ True \_\_\_ False
- In an expedited jury trial, each side has three hours to put on all witnesses, present evidence, and argue the case.  
\_\_\_ True \_\_\_ False
- In an expedited jury trial, there are still 12 jurors but each side gets fewer peremptory challenges.  
\_\_\_ True \_\_\_ False
- All parties need not consent to an expedited jury trial.  
\_\_\_ True \_\_\_ False
- No later than 15 days before an expedited jury trial, a pretrial conference will be conducted by the court.  
\_\_\_ True \_\_\_ False
- A party in whose favor a judgment is ordered and who is allowed to claim costs, must file a memorandum of costs no later than 15 days after the date of mailing of the notice of entry of judgment.  
\_\_\_ True \_\_\_ False
- A prevailing party does not need to notify anyone when they receive only partial payment of the judgment.  
\_\_\_ True \_\_\_ False

# Law Office Products/Management

By Lisa B. Vessels, CP, FRP

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## Paralegal Regulation—Vernacular

Recently, I have seen discussions on LinkedIn groups and Facebook about what I would consider the “basics” when it comes to the vernacular of paralegal regulation. It always amazes me that what I consider a basic definition is still somewhat of a mystery to paralegals, attorneys and administrators. But time and again I see the same questions pop up, so let’s explore two popular definitions of paralegal regulation, and perhaps identify where some misconceptions filter in.

When I was initially formulating this topic in my mind, I thought I would have many definitions for terms to provide. The first two terms which are the most important, took up so much space, that the general topic of paralegal regulation vernacular will be a topic to be revisited and explored in the future.

### CERTIFIED VS. CERTIFICATED

The number one misnomer I hear is: “I got a certificate from XYZ Paralegal School. I’m a certified paralegal!” Sorry, but no, you are certificated. Your certificate of completion from XYZ Paralegal School does not entitle you to use the moniker “certified paralegal.” Now, I can easily understand where this misconception occurs. I Googled “Certified Paralegal” and got over 682,000 results. I really had to wade through some information before I saw a somewhat plain explanation of this issue, and even that explanation was confusing here and there.

The next piece, about which I was mistaken myself for a time, is that there is only one certification exam you can take to call yourself certified as a paralegal — also untrue. Most of the articles I reviewed online also only mentioned two or three different certification exams as the only ones you could pursue for a “certification” as a paralegal. That also not accurate. The fact is there are now more avenues to certification available than ever, and the number grows all the time.

### UNRAVELING THE MYSTERY

As I mentioned earlier, there are many different types of certification exams you can take as a paralegal. If you’re reading this publication (National Paralegal Reporter) chances are that you know about the certification exams that the National Federation of Paralegal Associations, Inc. (NFPA) offers: the PACE exam and now the PCC Exam, which bestow the RP® and the CRP™ credentials respectively upon successful completion. Did you also know you will be considered “certified” as a paralegal if you pass these exams, too? Most will use the title “Registered Paralegal” in conjunction with the RP designation on their business cards (just like most with the CP® designation use the title “Certified Paralegal” on their business cards), but it is the passing of the exam which adheres to a particular standard administered by a recognized entity such as NFPA which bestows the “certification” piece.

### CONFUSION WITH TERMS

The confusion with the question “Am I a Certified Paralegal?” starts with the National Association of Legal Assistants (NALA) registered certification marks CLA® and CP (which are acronyms for Certified Legal Assistant and Certified Paralegal, respectively). The common use words “certified” and “paralegal” or a combination of the two are not registered trademarks of NALA. Here’s where the rubber hits the road: the following image is a registered trademark of NALA, see image.



Many people will interpret this to mean “Certified Paralegal” is a trademarked title, but that’s a mistake. This registered trademark means, if you have earned the CP designation, you have the right to use the image above. If you search the U.S. Patent and Trademark Office’s database for the registration number associated with this mark (Number 3048617-<http://www.uspto.gov/trademarks/index.jsp>-go ahead, look it up, it’s free), you will see that corresponding to the number is the wordmark “CP Certified Paralegal.” Among other information listed, there is a specific disclaimer which states: NO CLAIM IS MADE TO THE EXCLUSIVE RIGHT TO USE CERTIFIED PARALEGAL APART FROM THE MARK AS SHOWN.

There are separate trademarks also filed by NALA, which will allow you to use the marks CLA or CP in conjunction with your title on your business card. The words “certified” and “paralegal” are too common to be trademarked. If you look at other trademarked terms which contain the words “certified paralegal,” you will see a similar disclaimer. The fact of the matter that it is the passing of the test that certifies you as a paralegal, and in most cases it’s the maintenance of that certification that allows you to continue to refer to yourself as a certified paralegal.

Another good thing to clarify about certifications is that they are generally not issued by a governmental agency. Governmental agencies will generally issue a license to someone who meets a particular set of criteria to perform a particular act. The process of obtaining a license can be very similar to the certification process, and I will often hear someone state they now are “licensed” since they have completed the certification process. However, this is also a mistake.

### LICENSURE

This definition is probably the next most misunderstood term in the paralegal regulation vernacular. Licensure is used in professional credentialing by governmental agencies when someone has permission to perform some act. What exactly that act may be is defined by the terms of the license. The fact that someone is is-



*Melanie Herman*

## Governor's Report

by *Melanie Herman*

I recently received correspondence from LSI's Parliamentarian, Astrid B. Watterson, CCLS, dated June 22, 2012, which states in part the following:

NOTICE IS HEREBY GIVEN, pursuant to Article XIX, Section 2, subsection (a), of the LSI Bylaws, on May 20, 2012, at the Post Board of Governors meeting held in San Diego, California, Beverly Miller, CCLS, of Mt. Diablo LPA provided notice of a proposed Bylaw amendment to LSI Bylaw Article XIX, Section 2, subsection (b) by striking the sentence "Failure to notify the Executive Secretary within said 45-day period of the action taken shall be deemed an affirmative vote." The purpose of the notice to amend the Bylaw was to prevent abstentions from counting as an affirmative vote.

According to Robert's Rules of Order, section 4, it states "To 'abstain' means not to vote at all..." Additionally, it goes on to state in section 45 that, "Although it is the duty of every member who has an opinion on a question to express it by his vote, he can abstain, since he cannot be compelled to vote."

It is my belief that this proposal is stemmed from the recent amendment to LSI Bylaw Article V Section 1, which specifies the qualifications of an active LSI member. By way of this amendment, LSI now allows for students to be active members of LSI, stating "...; or (5) possesses, or is in the process, or obtaining a degree or certification from an educational institution which is related to the field of law." This amendment was distributed and voted on via electronically and it is my understanding that a number of local associations did not submit a response and therefore they were "deemed an affirmative vote."

The proposed Bylaw amendment at issue will be voted on at LSI's upcoming August 2012 Quarterly Conference. Therefore, at our July 2012, meeting the members discussed this Bylaw amendment and its implications. There was a motion to instruct the Governor to vote in favor of this Bylaw amendment, which carried. At

this time, I urge you to reach out to either myself, our President, Dawn R. Forgeur, CCLS, or our Parliamentarian, Astrid B. Watterson, CCLS, with any questions or concerns you may have prior to the August conference.

Speaking of the August conference, I have received the Official Notice. The August Conference is being co-hosted by Alameda County Legal Secretaries and Livermore-Amador Valley Legal Professionals Association on August 17, 18, and 19, 2012, at the Hilton located in Pleasanton, California.

I hope to see you all there to give your support of our very own Astrid Watterson, CCLS, as she fulfills her newly appointed role as LSI's Parliamentarian. Currently, there is only one matter that she has provided the Governors to be prepared to vote on at the August Board of Governors' Meeting, which is that of the above referenced, proposed bylaw amendment.

Additionally, I'm very excited to support SLSA members Dawn Forgeur, CCLS and Tammy L. Hunt, CCLS, as they hold their first seminars as LSI Legal Specialization Section leaders. Ms. Forgeur, as the Civil Litigation leader, has put together a great seminar on "e-Discovery" and Ms. Hunt, as the Law Office Administration leader, along with her scheduled speaker, Ms. Jeannine DeBacker, Esq., will be discussing "Mid-Year Employment Law Updates." For the full seminar schedule, please see the Legal Specialization Section Seminars registration form in this bulletin, along with the registration forms for the conference, hotel and the CCLS workshop on "Legal Terminology".

Again, I want to remind you all that Pleasanton is ONLY a short hour and thirty-seven minutes from Sacramento, so please join me in partaking in the Blue Ribbon Fair fun!

Be sure to attend the upcoming August conference in Pleasanton to support our very own, Astrid Watterson, CCLS, Dawn Forgeur, CCLS, and Tammy Hunt, CCLS as they fulfill their new respective LSI roles.

## Parliamentarian's Corner

By Astrid Watterson, CCLS

**D**id you know that there are rules for debating a motion? According to Robert's Rules of Order, there are only a few motions which you can debate on.

They are:

- Main motion
- Motion to postpone indefinitely
- Motion to amend
- Motion to refer to a committee
- Motion to postpone to a certain time
- Motion to appeal from the decision of the chair
- Motion to rescind
- Motion to amend something previously adopted
- Motion to reconsider
- Motion for a recess
- Motion to fix the time to which to adjourn

Should members wish to debate a motion, there are a few things to keep in mind. First, the member must obtain the floor and be recognized by the presiding officer before beginning to speak. You are not supposed to simply start talking. Stand and get the attention and be recognized.

The member who made the motion has the first right to speak to the motion and they do that by rising and obtaining the floor. A member can speak twice to the motion on the same day, but they can take their second turn only AFTER all others have spoken first. Each member can speak for ten minutes on each turn, unless previous time limits were included. The debate must be germane, meaning it has to be relevant to the motion. When debating a motion, the speakers must address their remarks to the chair, not to other members. Speakers should also be clear when debating whether they are speaking for or against the motion. Finally, the big item, be courteous. Don't make it a personal at-

tack. If you keep to the subject of the motion, you should be fine. If you get stuck and would like to find out more about parliamentary procedure, send me an e-mail and we can discuss it. In the meantime, I hope this information helps those who are interested.



Astrid Watterson,  
CCLS

*Should members wish to debate a motion, there are a few things to keep in mind...*  
~Astrid Watterson, CCLS





**LEGAL SECRETARIES, INCORPORATED  
AUGUST 2012 FIRST QUARTERLY CONFERENCE  
AUGUST 17, 18 & 19, 2012  
BLUE RIBBON FAIR**

**Hosted by:**

**ALAMEDA COUNTY LEGAL SECRETARIES ASSOCIATION AND  
LIVERMORE-AMADOR VALLEY LEGAL PROFESSIONALS ASSOCIATION**

**HILTON PLEASANTON AT THE CLUB, PLEASANTON, CALIFORNIA**

**CONFERENCE REGISTRATION FORM**

Name (On Badge): \_\_\_\_\_  
Mailing Address: \_\_\_\_\_  
City/State/Zip: \_\_\_\_\_  
Home Phone: \_\_\_\_\_ Work Phone: \_\_\_\_\_  
E-mail Address: \_\_\_\_\_  
Local Association: \_\_\_\_\_ LSA/LPA  
   
(Full Name)

**PLEASE CHECK IF APPLICABLE AND INCLUDE TITLE:**

State Officer : \_\_\_\_\_  
 State Chairman: \_\_\_\_\_

**PLEASE CHECK IF YOU ARE:**

Governor  CCLS  PLS

**SCRIP (INCLUDES REGISTRATION, WELCOME RECEPTION, BANQUET AND BRUNCH):**

Postmarked on or Before July 27, 2012                      \$108.00                      \$ \_\_\_\_\_  
Postmarked July 28, 2012 or later                              \$118.00                      \$ \_\_\_\_\_

**INDIVIDUAL TICKETS:**

Registration by July 27, 2012                      @                      \$15.00                      \$ \_\_\_\_\_  
Registration (After July 27, 2012)                      @                      \$25.00                      \$ \_\_\_\_\_  
Officer/Chairmen Luncheon\*\*                      @                      \$25.00                      \$ \_\_\_\_\_  
\*\*Friday Luncheon For State LSI Officers and Chairmen only\*\*  
Welcome Reception (Friday)                      @                      \$20.00                      \$ \_\_\_\_\_  
Governor's Luncheon (Saturday)                      @                      \$25.00                      \$ \_\_\_\_\_  
President's Luncheon (Saturday)                      @                      \$25.00                      \$ \_\_\_\_\_  
Membership Luncheon (Saturday)                      @                      \$25.00                      \$ \_\_\_\_\_  
Saturday Night Banquet                      @                      \$52.00                      \$ \_\_\_\_\_  
 BBQ Tri-tip                       Honey Ham                       Vegetarian Lasagna  
Sunday Brunch                      @                      \$27.00                      \$ \_\_\_\_\_

**TOTAL AMOUNT PAID:** \$ \_\_\_\_\_

Special dietary request: \_\_\_\_\_

**Please Make checks payable to and mail to:** "AUGUST 2012 LSI QUARTERLY CONFERENCE"  
Christa Davis, Registration Chair, 19827 Alana Road, Castro Valley, CA 94546

**For General Information Contact Co-Conference Chairmen:**

Cheryl L. Kent, PLS, CCLS - (925) 837-0585 -- Clkclcs@comcast.net - Livermore-Amador Valley LPA  
Mary S. Rocca, CCLS - (510) 865-0473 -- Marysrocca@aol.com - Alameda County LSA

**NO REFUNDS AFTER JULY 27, 2012**



**LEGAL SPECIALIZATION SECTION SEMINARS**  
**LSI 1st Quarterly Conference - August 17-19, 2012 - Hilton at the Club, Pleasanton**  
**Co-Hosts: Alameda County LSA and Livermore-Amador Valley LPA**



**REGISTRATION FORM - DEADLINE IS Tuesday, August 7, 2012**

Registration **MUST** be **RECEIVED** by the LSS Coordinator **on or before the deadline.**

**Please make advance reservations so materials may be prepared. Please check all appropriate boxes below.**

LSI SECTION MEMBER: Free with Advanced Reservations \$5.00 at the Door/After Deadline Handout Only: \$5.00	LSI NON-SECTION MEMBER: \$10.00 with Advanced Reservation \$15.00 at the Door/After Deadline Handout Only: \$10.00	NON-LSI MEMBER: \$15.00 with Advanced Reservation \$20.00 at the Door/After Deadline Handout Only: \$15.00
<b>Friday, August 17, 2012 - 7:30 p.m. to 9:00 p.m.</b>		
<b><u>FAMILY LAW:</u></b> Topic: "High Conflict Family Law, Children and/or Assets" Speaker: B. Palmer Riedel, Esq. <input type="checkbox"/> I will attend <input type="checkbox"/> Section Member <input type="checkbox"/> Non-Section Member <input type="checkbox"/> Non-LSI Member <input type="checkbox"/> Handout Only	<b><u>PROBATE/ESTATE PLANNING:</u></b> Topic: "Wills vs. Trusts" Speaker: Jennifer Lee Thaete, Esq. <input type="checkbox"/> I will attend <input type="checkbox"/> Section Member <input type="checkbox"/> Non-Section Member <input type="checkbox"/> Non-LSI Member <input type="checkbox"/> Handout Only	
<b>Saturday, August 18, 2012 - 10:30 a.m. to 12:00 p.m.</b>		
<b><u>TRANSACTIONAL LAW:</u></b> Topic: "Ethics for the Legal Professional" Speaker: Diane Mecca <input type="checkbox"/> I will attend <input type="checkbox"/> Section Member <input type="checkbox"/> Non-Section Member <input type="checkbox"/> Non-LSI Member <input type="checkbox"/> Handout Only	<b><u>LAW OFFICE ADMINISTRATION:</u></b> Topic: "Mid-Year Employment Law Updates" Speaker: Jeannine DeBacker, Esq. <input type="checkbox"/> I will attend <input type="checkbox"/> Section Member <input type="checkbox"/> Non-Section Member <input type="checkbox"/> Non-LSI Member <input type="checkbox"/> Handout Only	
<b>Saturday, August 18, 2012 - 4:00 p.m. to 5:30 p.m.</b>		
<b><u>CRIMINAL LAW:</u></b> Topic: "How Can You Defend Someone Like That?" Speaker: Timothy B. Rien, Esq. <input type="checkbox"/> I will attend <input type="checkbox"/> Section Member <input type="checkbox"/> Non-Section Member <input type="checkbox"/> Non-LSI Member <input type="checkbox"/> Handout Only	<b><u>CIVIL LITIGATION:</u></b> Topic: "e-Discovery" Speaker: Kenneth Strongman, Esq. <input type="checkbox"/> I will attend <input type="checkbox"/> Section Member <input type="checkbox"/> Non-Section Member <input type="checkbox"/> Non-LSI Member <input type="checkbox"/> Handout Only	

Name: \_\_\_\_\_ PLS/CCLS/CLA/Paralegal E-mail: \_\_\_\_\_  
 Address/City/State: \_\_\_\_\_  
 Phone: (Work) \_\_\_\_\_ (Home) \_\_\_\_\_ Local Assn.: \_\_\_\_\_ LSA/LPA  
 Method of Payment:  Check    Credit Card   Number \_\_\_\_\_ Expiration Date: \_\_\_\_\_  
 Name on Credit Card: \_\_\_\_\_ Type of Card: Visa  M/C  Am Ex  Card Verification No: \_\_\_\_\_

**Mail, Fax, or Email completed form to:**  
 Cheryl L. Kent, PLS, CCLS, LSS Coordinator  
 5534 Blackbird Drive, Pleasanton, CA 94566  
 925-623-3086 (fax) ~ [clkccls@comcast.net](mailto:clkccls@comcast.net)

Send a self-addressed, stamped envelope if you wish confirmation of your reservation.

**PLEASE MAKE ALL CHECKS PAYABLE TO "LSI"**

*Speakers and Topics are Subject to Change*

PER LSI STANDING RULES, CHECKS ISSUED TO LSI WHICH ARE NON-NEGOTIABLE BECAUSE OF INSUFFICIENT FUNDS OR OTHER REASONS 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.

*The Legal Specialization Sections are a program of Legal Secretaries, Incorporated, an approved provider, and certify that these seminars have been approved for minimum MCLE/CLE credit of 1.25 hours each, by the State Bar of California.*

**2012-2013 Legal Specialization Section Leaders:**

<b>Civil Litigation:</b> Dawn R. Forgeur, CCLS <a href="mailto:dforgeur@stoel.com">dforgeur@stoel.com</a>	<b>Law Office Administration:</b> Tamm y L. Hunt, CCLS <a href="mailto:loaleader@tlhunt.org">loaleader@tlhunt.org</a>
<b>Criminal Law:</b> Christina Vieira <a href="mailto:Charlye22@yahoo.com">Charlye22@yahoo.com</a>	<b>Probate/Estate Planning:</b> Kristi L. Edwards, CCLS <a href="mailto:kledwards@justice.com">kledwards@justice.com</a>
<b>Family Law:</b> Mary Lou Floyd, CCLS, M.S. <a href="mailto:Louloux7@yahoo.com">Louloux7@yahoo.com</a>	<b>Transactional Law:</b> Lisa De La O <a href="mailto:ldeiao@fitchewen.com">ldeiao@fitchewen.com</a>



## **Continuing Education Council**

PROUDLY PRESENTS



**Kevin L. Nichols**  
**Principal**

**KLN Consulting Group**

**Effective and Ethical Use of Social Media &  
Networking in the Law Office\***

**FRIDAY, AUGUST 17, 2012**

5:15 p.m. to 6:15 p.m.

Hilton Pleasanton at the Club

**Join Mr. Nichols as he examines both the best practices of social media and the ethical implications of doing so. The program will address the pros, cons, and usefulness of different online social media, a "nuts & bolts" demonstration of how to create your own blog, and a road map through the professional and ethical implications of using social media in your practice.**

For reservations email J. Cori Mandy, CCLS at [cori.mandy@procopio.com](mailto:cori.mandy@procopio.com) or telephone: 619-954-3603.

\*Legal Secretaries, Incorporated, an approved provider, certifies that this activity has been approved for minimum continuing legal education credit by the State Bar of California in the amount of 1.0 hours, of which .5 hours will apply to legal ethics.

**CHAPTER ACHIEVEMENT REPORTING FORM**

Each association in LSI participates every year in the Chapter Achievement contest. An award of \$250 is presented by LSI to the highest scoring association in each membership category at the Annual Conference of LSI. Chapter Achievement Points (CAPs) are tracked during the year by SLSA's Governor. This covers activities from April 1, 2012, through March 31, 2013. This form's purpose is to track each member's activity during the course of the fiscal year. **Please complete this form each time you attend a function and mail it to SLSA's Governor.** If you attend a function and are not sure if it applies, include it below on the blank line provided and it will be determined if it applies.

**Date of Event**

**Event**

- \_\_\_\_\_ I submitted an article to *The Legal Secretary* magazine. (50 points)
- \_\_\_\_\_ I attended an LSI Quarterly or Annual Conference. (50 points)
- \_\_\_\_\_ I attended an Officer/Chairman Workshop at the Annual Conference.  
How many? \_\_\_\_\_ (25 points)
- \_\_\_\_\_ I belong to an LSI-sponsored credit union. (100 points)
- \_\_\_\_\_ I am insured through an LSI plan. (100 points)
- \_\_\_\_\_ I rented a car through Hertz with the LSI discount. (200 points)
- \_\_\_\_\_ I took the CCLS exam - Test Date: \_\_\_\_\_. (100 points)
- \_\_\_\_\_ I passed the CCLS exam - Test Date: \_\_\_\_\_. (200 points)
- \_\_\_\_\_ I submitted questions to LSI for use on the CCLS Mock exam.  
How many? \_\_\_\_\_. (25 points per question)
- \_\_\_\_\_ I recertified as a CCLS during the 2012-2013 fiscal year. (50 points)
- \_\_\_\_\_ I attended another association's monthly meeting, installation, or other function. (50 points)
- \_\_\_\_\_ I attended an educational workshop or seminar sponsored by SLSA or another local  
association. (25 points)
- \_\_\_\_\_ I attended an educational workshop or seminar sponsored by a Forum, CEB, or  
The Rutter Group. (25 points)
- \_\_\_\_\_ I am a member of at least one Legal Specialization Section. (50 points)
- \_\_\_\_\_ I am a member of all six Legal Specialization Sections as of March 31, 2013. (100 points)
- \_\_\_\_\_ I attended a Legal Specialization Section Seminar at Quarterly or Annual  
Conference. How many? \_\_\_\_\_. (50 points per seminar)
- \_\_\_\_\_ I attended a Legal Specialization Section Regional Seminar. (75 points)
- \_\_\_\_\_ I submitted an article for use in a Legal Specialization Section newsletter. (50 points)
- \_\_\_\_\_ I purchased the *Legal Professional's Handbook* (LPH) between April 1, 2012, and  
March 31, 2013. (200 points)
- \_\_\_\_\_ I purchased the *Law Office Procedures Manual* (LOPM) between April 1, 2012,  
and March 31, 2013. (200 points)
- \_\_\_\_\_ I purchased updates to the LPH between April 1, 2012, and March 31, 2013. (100 points)
- \_\_\_\_\_ I purchased updates to the LOPM between April 1, 2012, and March 31, 2013. (100 points)

Name: \_\_\_\_\_ Email: \_\_\_\_\_

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

Sacramento LSA  
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Perkins & Associates  
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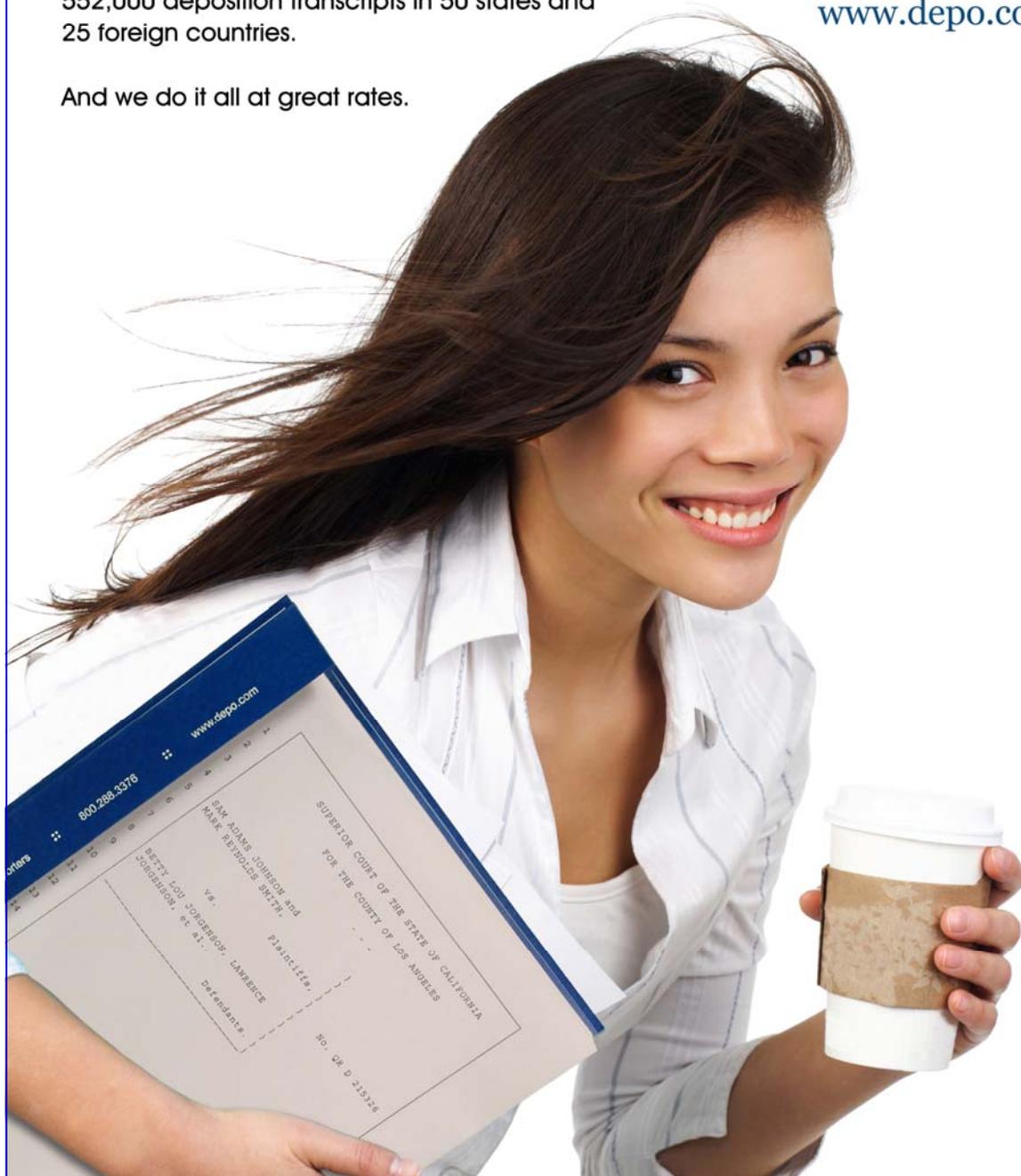
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# FOR SALE!

Sacramento Legal Secretaries Association is selling 2 GB flashdrives as part of its Ways and Means project this year. Help support SLSA and purchase your flashdrive today. They will be sold at the general meetings or you may contact SLSA President Dawn Forgeur, CCLS at [drforgeur@stoel.com](mailto:drforgeur@stoel.com).

**\$10 EACH**



# Legal Procedures

by Dawn Forgeur, CCLS

## *Increase in Statewide Fee Schedule*

In July 2012, the Statewide Civil Fee Schedule had several fee increases. Some of the updated fees are listed below:

- Complaint or other first paper fee in an unlimited or unlawful detainer matter: \$435
- Answer or other first paper fee by each party other than plaintiff: \$435
- Petition for writ of review, mandate, or prohibition: \$435
- Additional fee for case designated as complex: \$1,000
- Motion or other paper requiring a hearing: \$60
- Appeal or cross appeal to court of appeal: \$775
- Various other Family Law and Probate Law fees have increased also.

You may review the current Statewide Civil Fee Schedule at this URL:  
[www.courts.ca.gov/documents/fee-schedule-062712.pdf](http://www.courts.ca.gov/documents/fee-schedule-062712.pdf).

## Advance Deposit of Jury Fee

Code of Civil Procedure section 631 has been updated. Some of the changes are as follows:

- Fees must be deposited on or after June 28, 2012, are now non-refundable.
- Fees must be deposited on or before the date scheduled for the initial case management conference; or
- If no CMC is scheduled, no later than 365 days after the filing of the initial complaint.
- These new deadlines apply to cases that were filed before the effective date of this amendment.
- If you miss the deadline, you waive your right to a trial by jury.

Please review the FAQ from the Administrative Office of the Courts for more detailed information, [www.courts.ca.gov/documents/JURY-FAQs-for-Attys-Ptys-7-16-12.pdf](http://www.courts.ca.gov/documents/JURY-FAQs-for-Attys-Ptys-7-16-12.pdf)

## US Bankruptcy Court – Central District

The Court will implement the new CM/ECF Filing Agent on Monday, July 16, 2012. Filing Agent is an optional feature that enables registered CM/ECF users to assign unique logins and passwords to support staff filing electronic documents on their behalf.

The benefits of using the Filing Agent are:

- Registered CM/ECF users will no longer need to share their personal CM/ECF password and login with employees;
- Employees provided with their own logins and passwords will be able to work in CM/ECF simultaneously; and
- Registered users will be able to access reports to view filing activity for each of their registered employees using reports available in CM/ECF.

You may find the official Public Notice here:  
[www.cacb.uscourts.gov](http://www.cacb.uscourts.gov).

## El Dorado Superior Court

Effective Monday, August 27, 2012, all branches will reduce service hours for the public filing windows and telephones by one hour. The new hours are 8:00 a.m. to 3:00 p.m. Drop boxes are located outside each Clerk's office for filing papers or submitting payments and will be deemed filed same day if deposited before 4:00 p.m. on a court day. Comments may be submitted to [scadmin@eldoradocourt.org](mailto:scadmin@eldoradocourt.org).



# CCLS Terminology List

by *Launa Atkinson, CCLS*

Civil Active List	A list of pending cases awaiting assignment of a trial date.
Conform	To stamp with the court’s filing stamp evidencing date of filing.
Demurrer	A formal objection to a pleading.
Ex Parte	It refers to a special hearing among all counsel at a time when the court is not generally in session or is in session for special purposes only.
In Camera	In chamber
Judgment	The official decision of the court in a proceeding.
Jury	A specified number of persons selected to determine questions of fact, render a verdict, or decide a contested matter.
Peremptory Challenge	An objection made to a juror for which no cause is given.
Prayer	That part of a pleading which sets forth the relief sought or the orders the party wishes the court to make.
Trial De Novo	Trial from the beginning; to start anew.

# CCLS Quiz Answers

## CCLS QUIZ ANSWERS (from page 14):

- |                       |                             |
|-----------------------|-----------------------------|
| 1. (True, LOPM B-58)  | 6 (False, LOPM B-65)        |
| 2. (True, LOPM B-58)  | 7. (False, LOPM B-65)       |
| 3. (False, LOPM B-61) | 8. (True, LOPM B-66)        |
| 4. (True, LOPM B-63)  | 9. (True, LOPM B-66 – 66.1) |
| 5. (True, LOPM B-65)  | 10. (False, LOPM B-66.1)    |



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

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

Enclosed is payment of my dues for the fiscal year 8/1/11 through 7/31/12 for the following Section(s). Please check appropriate boxes below for the sections you are joining.

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ADDRESS/CITY/STATE/ZIP \_\_\_\_\_

LOCAL ASSOCIATION: \_\_\_\_\_ LSA/LPA

RESIDENCE PHONE ( ) \_\_\_\_\_ BUSINESS PHONE: ( ) \_\_\_\_\_

E-MAIL ADDRESS(ES): \_\_\_\_\_

EMPLOYER: \_\_\_\_\_

EMPLOYER'S ADDRESS: \_\_\_\_\_

**PREFERRED MAILING ADDRESS:    HOME    OFFICE    EMAIL**

YEARS OF LEGAL EXPERIENCE: \_\_\_\_\_

SPECIALTY: \_\_\_\_\_

FAMILIAR WITH PRACTICE IN COUNTIES OF (Please indicate each County, not area):  
\_\_\_\_\_



# Sacramento Legal Secretaries Association

## Dinner Meeting - August 16, 2012



### June Coleman, Esq.

President - Sacramento County Bar Association

Updates from the Sacramento County Bar  
and A Look at  
The Fair Debt Collection Practices Act and  
The Fair Credit Reporting Act

Vendor of the Month:  
Atkinson-Baker

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

**Courtyard Marriott - Midtown Sacramento**

4422 Y Street, Sacramento

**\$25 SLSA Members\*/\$28 Non-Members\***

**R.S.V.P. by Tuesday, August 14.** Checks should be made payable to SLSA, and mailed to Shelly Reyes, Registration/Reception Chair 2012-2013, c/o Law Office of Robert J. Binns, 3620 American River Dr., Ste. 175, Sacramento, CA 95864; fax: 916-487-6314.

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

**MCLE & CCLS Credit:** SLSA, a local association of Legal Secretaries, Incorporated, an approved provider, certifies that this activity has been approved for minimum continuing legal education credit by the State Bar of California in the amount of **0.5 hours**.

NAME: \_\_\_\_\_

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EMAIL: \_\_\_\_\_

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Do you require an  MCLE or  CCLS certificate?

Are you an SLSA member?  YES  NO

If "No", are you interested in membership?  YES  NO

Are you interested in volunteering with SLSA?  YES  NO

### Entrée Selection:

Italian Chicken – chicken breast with prosciutto, artichoke, mushrooms, and chardonnay.

Mushroom Ravioli with champagne cream and frizzled leeks.

All meals will be served with an heirloom tomato and fresh mozzarella salad with balsamic dressing and dessert.



Alex Cain

# June Regular Meeting Vendor Spotlight: Nationwide Legal

by Lynne Koroush

Nationwide Legal is more than an attorney and messenger service. With 10 offices around the country, and each professional staff member possessing over 10 years of experience, Nationwide provides unsurpassed expertise in:

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Thank you very much to Alex Cain and the folks at Nationwide Legal for being at our June meeting and being SLSA's Vendor of the Month!

For more information on Nationwide Legal, please contact Alex Cain at 916-443-4400.

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On-line Order Entry

Los Angeles. Santa Ana. San Francisco. San Diego. Riverside. Sacramento  
 Phoenix. Tucson. Las Vegas. San Jose. Oakland

Alex Cain  
 (916) 443-4400

# June Regular Meeting Speaker Spotlight: Attorney James M. Nelson

by Dawn Forgeur, CCLS

Our speaker this month was James M. Nelson, Esq. from the law firm of Greenberg Traurig (“GT”), and he talked about Ethics for Legal Staff. We are very appreciative to Mr. Nelson for taking time out of his schedule to come talk to us.

Mr. Nelson talked about current ethical issues in the workplace today for staff as a result of various factors beyond the staff’s control, such as the economy, law firms doing more with less and faster, the excessive reliance on technology, and reaction replacing reflection.

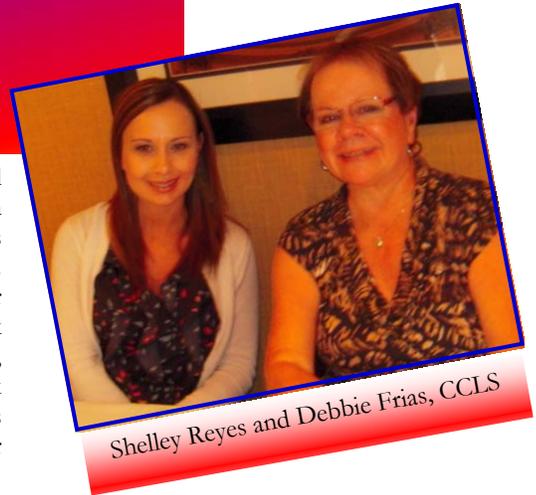
He described typical situations that staff can quickly get themselves into when they are over-stressed, such as the typical internal debate between the “good angel” and “bad angel” on your shoulder, or how a substance abuse/fidelity issues can spill over into the workplace and create ethical problems.

Potential ethical issues can start with expense and trust account issues; i.e., does a \$300 taxi ride from the airport make sense? Calendaring - while this is the attorney’s ultimate responsibility, the secretary can help by quickly reviewing the calendars for items that seem out of place or that don’t look familiar and bring those to the attorney’s attention. With document handling, green is not always good! For example, should you recycle or shred those documents? If there is any question of client confidential information in that document – shred. Especially if you are not positive that the recycling bin actually gets shredded!

Mr. Nelson also covered inappropriate conversations, and discussed that internal gossip in the office and elevator discussions are inappropriate. He reminded everyone that you should

be aware of where you are when talking on your cell phone about client matters! Finally, Mr. Nelson covered the social media issue and basi-

cally said that every firm should have a social media policy in place and staff should always watch what they say online. Just because you have your privacy settings on Facebook set to the highest privacy ever, doesn’t mean that Facebook isn’t going to change its policies and next thing you know, your posts are viewable by everyone.

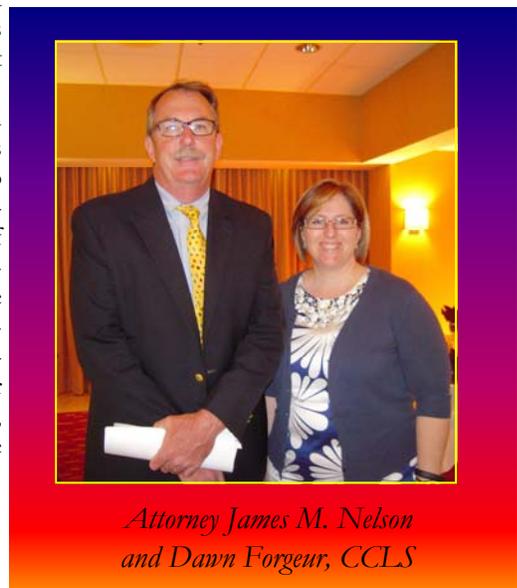


Shelley Reyes and Debbie Frias, CCLS

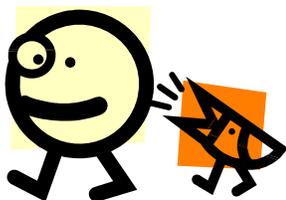


Mary Taylor-Higgins, Dawn Willis, and Ruby Trammel

Mr. Nelson is a shareholder at Greenberg Traurig and also chairs GT’s Labor and Employment practice group here in Sacramento. Mr. Nelson received his J.D. from the University of Arizona James E. Rogers College of Law and also received his B.A. from the University of Arizona. He is a Fellow of the American College of Employee Benefits Counsel, the College of Labor and Employment Lawyers, the American Bar Foundation, and is an Adjunct Professor of The John Marshall Law School, LLM in Employee Benefits degree program.



Attorney James M. Nelson and Dawn Forgeur, CCLS





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

~Lynne Koroush



# July Regular Meeting Vendor Spotlight: TSG Reporting

by Lynne Koroush

TSG Reporting provides litigation, arbitration, and deposition support, specializing in complex commercial litigation cases. They are proud to serve clients nationally and internationally; from New York to New Delhi, Los Angeles to London, all depositions are considered local. Service is on time, every time, anywhere in the world. TSG provides comprehensive litigation support, offering clients a single point of contact for all litigation

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Thank you very much to Ashley Brandon and the folks at TSG Reporting for being at our July meeting and being SLISA's Vendor of the Month!

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TSG Reporting, Inc.  
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San Francisco, CA 94104  
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TSG Goodies



Ashley Brandon of TSG Reporting and Lynne Koroush

# July Regular Meeting Speaker Spotlight: Judge Russell L. Hom

by Dawn Forgeur, CCLS

LSA was honored to have Judge Russell L. Hom from the Sacramento Superior Court take time out of his schedule to come speak to us regarding Expedited Jury Trials for our July dinner meeting.

Judge Hom was appointed by Governor Gray Davis to the Sacramento Superior Court in May 2002. He formerly served as the chair to the Education Committee for the Court and was a member of the Courts Working Group subcommittee of the State Bar of California Diversity Pipeline Committee. He is a member of the Judicial Council of the National Asian Pacific American Bar Association, a Judicial Master of the Anthony M. Kennedy Inn of Court and a Past President of the California Asian-Pacific American Judges Association. His current trial assignment includes presiding over cases assigned to the Expedited Jury Trial Project.

Judge Hom explained that the purpose of the Expedited Jury Trial Program (“EJT”) is to try to break down the barriers to justice. Such barriers include prolonged trial dates, uncertainty of available courtrooms, cost prohibitions, complexity of the trial rules, and lack of finality of the case after a trial. The EJT is a collaborative effort by the Plaintiff’s Bar, Defense Bar, and the insurance industry.

The benefits to an EJT include timely trial dates, confirmed trial date (which is probably one of the most important things to a litigator), greatly reduced costs of litigation, few evidentiary issues, and there is limited appeal rights, meaning there can be a finality of judgment. In states where the courts have been doing EJTs (New York and South Carolina), the average plaintiff’s verdict is \$150,000 and the ratio of plaintiff-to-defense verdicts has not changed. This is important because plaintiff attorneys were worried that EJTs would be skewed towards the defense.

Here are some of the rules for an EJT:

- Voluntary process and requires a court-approved written consent order
- Binding – no right to appeal

- Entire trial completed in 7 hours
- Each side has a 3-hour time limit for presentation of their case (including cross examination)
- Each party has 15 minutes for voir dire – including the judge
- Each party has only 3 preemptory challenges
- Jury is comprised of only 8 people and there are no alternates
- Jury decision must be by agreement of 6 of the 8 jurors
- No case is too large or too small
- Witness and exhibit lists are due 25 days before trial
- Supplemental witness and exhibits lists are due 20 days before trial
- Pretrial conference with the court is 15 days before trial

What rules an EJT doesn’t change:

- Rules of evidence
- Right to subpoena
- 3/4 agreement for verdict
- Discovery
- Unlimited jury deliberations
- Attorney fees

Judge Hom said that the bottom line to EJTs is that they require cooperation between counsel, the more stipulations the better, the parties must be ready to go with no issues left before trial starts, and the focus during trial is on getting the essential facts to the jury and not gamesmanship.

Attendees learned quite a bit about EJTs during Judge Hom’s presentation, and we are very appreciative of his time in presenting this information to us. I hope that attendees were able to take this information back to their attorneys and that these attorneys give the EJT process a try.



Dawn Forgeur, CCLS, Judge Hom, and Anne French





*Tara Stevens and Carolyn Broderick*



*Launa Atkinson, CCLS  
with her daughter*

# July 2012



*Maimie Chyinski and Crystal Rivera*



*Paula Lockard, CCLS and Tami Cheung*



*Crystal Rivera and  
Jennifer Estabrook, CCLS*



*Lacy Monserrat, Heather Rodriguez,  
and Jan Warner*

# Dinner Meeting



*Jennifer Estabrook, CCLS, Lynne Koroush,  
Melanie Herman, and Maryanna Rickner*



*Shelly Reyes and Deseree Gamayo*



### Sacramento Legal Secretaries Association Name/Address Change Reporting Form

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

**CHANGES IN MEMBER INFORMATION (PLEASE PRINT LEGIBLY):**

NAME: \_\_\_\_\_

FORMER NAME: \_\_\_\_\_

NEW EMPLOYER: \_\_\_\_\_

BUSINESS ADDRESS: \_\_\_\_\_

CITY: \_\_\_\_\_

STATE & ZIP: \_\_\_\_\_

BUSINESS PHONE: \_\_\_\_\_

FAX: \_\_\_\_\_

BUSINESS E-MAIL: \_\_\_\_\_ (for vital updates/reminders)

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**CHANGE IN SPECIALTY:**

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

**CHANGES TO MAILING/LISTING INFORMATION:**

Where do you want *The Legal Eagle* and other SLSA/LSI mail delivered?

Where do you want e-mail delivered?

Which address should be listed in the membership roster?

If you do NOT want to be listed in the membership roster, check here:

- |                                            |                               |
|--------------------------------------------|-------------------------------|
| <input type="checkbox"/> Business          | <input type="checkbox"/> Home |
| <input type="checkbox"/> Business          | <input type="checkbox"/> Home |
| <input type="checkbox"/> Business          | <input type="checkbox"/> Home |
| <input type="checkbox"/> No roster listing |                               |

Please submit to:

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

# July

Katelynn Poulos	July 2
Terry Lee Farster	July 8
Marlene Celis	July 11
Barbara Haviland	July 11
Angela Kolak	July 13
Heather Rodriguez	July 15
Alison Horak	July 17
Jeffrey Shuitema	July 18
Pamela Lee, CCLS	July 22
Maryanna Rickner	July 22
Noreen Patrignani	July 24
Paula Lockard, CCLS	July 27
Beverly McBride	July 31



# August

Nicole Scruggs	August 2
Liz Gideon, CCLS	August 5
Cynthia Biscarra	August 10
Marve Breech, CCLS	August 10
Robin Blackwell	August 12
Susan Hryekewicz, CCLS	August 13
Sandy Machado	August 13
Ron Bodenmann	August 15
Caroline Rose	August 16
Ellie Wright	August 16
Evelyn Thais	August 20
Alex Cain	August 21
Mary Taylor-Higgins	August 22
Marina Tsushko	August 23
Shaine Kennedy	August 27
Margarita Jokovas	August 29
Jessica Equihua	August 30



# Delegate Report: LSI 78th Annual Conference

by Sherri Lee Caplette, CCLS

I love attending conferences, especially the LSI annual conference. This year was no different. Hosted by San Diego Legal Secretaries Association and Imperial County Legal Professionals Association, the 78th Annual LSI Conference took place at the Bahia Resort Hotel in San Diego from May 17 to May 20, 2012. It was a beautiful place right next to the ocean. In fact, most of the rooms had a view of the ocean. A few of our meetings even took place on a ship that was harbored next to the hotel.



The whole weekend was filled with activities, both educational and entertaining. I found myself needing to prioritize which event to attend, because there was so much to do and see. On Friday morning, I started off the day with a fabulous breakfast brought to my room. I sat at the table, gazing out the sliding glass door at the beautiful ocean view, when two little ducks started waddling across the lawn right outside the room's door. What a nice way to start the day.

My first workshop of Friday, at 9:00 AM, was the Minutes / Notes / Correspondence / Parliamentary workshop—it was an all-in-one workshop. At 10:30 AM, I attended the Hosting LSI Conference workshop. As always at these events, great information and great handouts! If anyone is interested in getting a copy of the handouts, please drop me a note and I will e-mail you a copy. You can also find them on the [lsi.org](http://lsi.org) website.

After these two workshops, it was time for lunch and a little respite before the afternoon workshop, "Introduction into the Federal Criminal Justice System." During this break in events, I found myself visiting the exhibitors' booths, the bulletin contest room, and the history book/scrapbook room. After that, I found some time to shop at the hotel's gift shop (great prices!). After the workshop, it was off to the Friday Reception. At the receptions, I always

find time to catch up with friends and colleagues from around the state.

On Saturday morning, right before 9:00 AM, I met up with Anne French and Debbie Frias CCLS, to attend the LSI general business assembly. We were elected as delegates of SLSA.

For those of you unfamiliar with the responsibilities as delegates of SLSA, we are to attend the LSI general business meeting. The general business assembly opens on Saturday morning at 9:00 AM and usually lasts until approximately 3:30 PM (with breaks of course!). It is at the general business meeting that the delegates vote on any business that needs to be resolved.

With that being said, the general business meeting was a day full of information and entertainment. We heard from the LSI officers and chairs about their positions and what they have done on behalf of LSI. We heard who the winners were of the history books and scrapbooks. There were also the presentations of the bulletin contest winners, the scholarship contest winners, and the association winners who gained the most members in the last fiscal year. With a whoop and a holler, the winner (the "point person" for the association—usually the governor) runs up to the lectern to receive her/his award. It is a joy seeing the reactions of the winners when their association's name is announced. I have listed all the winners of the contests/awards at the end of this article.

The only business the delegates had to vote on was for LSI treasurer. The election was between Heather Edwards from San Fernando Valley LSA (my former association!) and Carrie Hughes, CCLS, from Mt. Diablo LPA. The SLSA delegates had been instructed in advance to vote for Heather Edwards. I have known Heather for over two decades; I know she will be an excellent treasurer. Heather won the election.

There was no opposition on any of the other offices, so the officers were elected by acclamation.



# Delegate Report (cont.)

## LSI 78th Annual Conference

by Sherri Lee Caplette, CCLS

When the general assembly meeting broke for lunch, I attended the CCLS luncheon. This annual luncheon honors the individuals who passed the CCLS exam during the entire last fiscal year. It was announced that one of those individuals is our own Elizabeth Gideon! Congratulations Liz! Assisting with congratulating the CCLSs was special guest Kalman Zemplyny II, President of The Rutter Group, a strong supporter of LSI and the CCLS program.

The general assembly meeting adjourned for the day after all the reports of its officers and chairs were given. I immediately went to the Ethics workshop. Again, great handouts! I will be happy to provide a copy to you if you drop me a note.

After all of our hours of sitting in the meetings, it was wonderful being able to relax with friends at the banquet later. That evening it was announced that the LSI President's Award was given to Christa Davis, a former LSI president, for her work and dedication over the year. The chapter achievement winners were finally announced and are listed below.

That, dear friends, is a typical Saturday at annual conference.

Sunday morning is the last leg of the general assembly. Following the morning brunch, LSI had its installation of officers (named above). It is here that the newly elected president names her incoming chairs. Among the many people named, our president, Dawn R. Forgeur, CCLS, was appointed as the Civil Litigation Legal Specialization Section Leader, and our Tammy Hunt, CCLS, was appointed as the Law Office Administration Section Leader. Our own Astrid Watterson, CCLS, is an appointed officer—the LSI parliamentarian! Congratulations Astrid! These women deserve a great round of applause. They have taken on tremendous roles to help further SLSA and LSI.

The meeting was adjourned shortly thereafter, because there was no further business to come before the general assembly. At this point, the delegates' duties are officially over. However, immediately after the general assembly meeting,

there is a post-governor's meeting, which your governor attends. Your governor comes back to SLSA and reports to us on the activities that occur there. I, in typical fashion, went too. Anyone can attend the post-governor's meeting. That is where you see the "meat" of what happens. It is always beneficial to go to these meetings. Especially this one, since our own Astrid Watterson, CCLS, performed her official duties for the first time as the newly appointed LSI parliamentarian.

For anyone who has never attended a conference, these are great conferences. They are organized, structured, and educational. You walk away enlightened. You walk away with new contacts. Knowing a contact in other counties is priceless.

Learning updates, being taught new things, staying in the forefront of our field—education—is what we're about. It's even better when you're away from all the daily pressures, when you're with people who understand what you go through every day at the office, and in an ideal location to boot!

We could not run this organization without the volunteers. We cannot keep it running without all of us. If any of you haven't been to a conference, if you haven't volunteered, give it a chance. Giving back to the association will benefit not only you, but also every member.

Thank you for sending me as your Delegate. I always enjoy myself at annual conference, and this time was no exception.

### NEW OFFICERS

President: Sandra T. Jimenez, CCLS, Imperial County LPA

First Vice President: Mary J. Beaudrow CCLS, Mt. Diablo LPA

Executive Secretary: Jennifer L. Page, CCLS, Marin County LPA



# Delegate Report (cont.)

## LSI 78th Annual Conference

by Sherri Lee Caplette, CCLS



*Anne French*

Treasurer: Heather Edwards, San Fernando Valley LSA

### Membership Gain Contest Winners

Group Category A (5 – 30 members): Santa Maria with a 42% gain

Group Category B (31 – 50 members): San Francisco with a 48% gain

Group Category C (51 - 75 members): San Fernando Valley with a 54% gain

Group Category D (76 - 95 members): Orange County with a 47% gain

Group Category E (over 96 members): Sacramento with a 34% gain

### Bulletin Contest Winners

#### Class E (over 95 members)

First Place: San Diego  
Second Place: Sacramento

#### Class D (76 to 95 members)

First Place: Santa Clara  
Second Place: Orange County

#### Class C (51 to 75 members)

First Place: San Mateo County

#### Class B (31 to 50 members)

First Place: San Gabriel Valley  
Second Place: San Francisco  
Third Place: Los Angeles

#### Class A (5 to 30 members)

First Place: Desert Palm  
Second Place: Southern Butte County  
Third Place: Santa Maria

### History Book Winners

#### Class E (over 95 members)

First Place: San Diego

#### Class D (76 to 95 members)

First Place: Orange County

#### Class C (51 to 75 members)

First Place: San Mateo

#### Class B (31 to 50 members) – no entries

#### Class A (5 to 30 members)

First Place: Butte County

History Book Winner's Choice: San Diego

### Scrapbook Winners

First Place: Merced

Second Place: Santa Clara

Third Place: Mt. Diablo

Fourth Place: Conejo Valley

Scrapbook Winner's Choice: Santa Clara

### Scholarship

#### Plan B (high school)

Second Alternate: Applied to LSI directly  
First alternate: Orange County  
Second Place: Los Angeles  
First Place: Merced

#### Plan C (re-entry to the work force)

Second alternate: Santa Clara  
First alternate: Orange County  
Third Place: Rio Hondo  
First Place (tie): San Fernando Valley  
First Place (tie): Stockton

#### Plan A (college)

Third alternate: San Diego  
Second alternate: Applied directly to LSI  
First alternate: Stockton  
Third Place: Los Angeles  
Second Place: Mt. Diablo  
First Place: San Diego

# Law Office Products Management (cont.)

sued a license merely means they have permission to do whatever that license allows them to do — nothing more, and nothing less.

Many folks interpret the word licensure as solely meaning the provision of services to the public, but that is incorrect. Let's look at your driver's license, for example. The issuance of a driver's license allows you to operate a motor vehicle, not to drive a taxi for hire. Depending on the laws of your state, to drive a taxi you might need to get a special driver's license, apart from the one you use to drive your own private car, plus another license to operate the taxi business.

The concept behind licensure is that there is some skill required for the activity that the license permits. The granting of a license is merely evidence that the person holding that license possesses that skill (bad drivers notwithstanding). In most cases, you have to provide some sort of documentation to prove that you possess that skill, or take a test of some sort to prove that you possess a high enough degree of that skill. Some professional sports, such as

boxing, even require a license. We all know how entertaining for the public that boxing can be. Are professional sports providing a service directly to the public? No.

It is very likely that you will see the term licensure come up more often as individual states consider regulatory programs for paralegals.

The state governmental agency overseeing that regulatory program must find a way to confirm that a particular person has complied with the terms of the regulatory program. Issuing a license is pretty commonplace in the regulation of professions. Don't let anyone perpetuate the urban myth that the issuance of a license to a paralegal means that the paralegal will be able to provide legal services to the public. Read the terms of the license which outlines what the licensee can and cannot do.

Lisa B. Vessels lives in Miami, Florida, and is employed by Duane Morris LLP, as administrator of a rules-based docketing software for the firm's offices nationwide. She serves as NFPA's Regulation Review Coordinator.



## July Lunch Lesson

by Anne French

LSA's lunch lessons are back and with a fabulous sold out start! On July 31, 2012, Lauren Yip, Esq. of Downey Brand LLP gave a presentation on the California Style Manual ("CSM") as Part One of our citation lessons. Now, any of you who have perused this book, understands that giving an informative overview of the CSM is no small feat to accomplish during the lunch hour. However, Ms. Yip did a fantastic job of giving a great overview of the CSM. This class was quite helpful with those who have never really used the CSM or as a refresher for those who may be a little rusty in some areas. Ms. Yip was very entertaining in her examples using celebrity headlines which kept the class not only entertained but light-hearted in explaining the various styles used in the CSM. I have received a lot of posi-

tive feedback from those who participated in this lunch lesson. Thank you to all who sent me messages and your comments after the class, I really appreciate the feedback from everyone whether your comments are positive or even if you have constructive criticism. This helps to make these classes worth your time during a busy work day. Please keep a look out for our next lunch lesson in September when we will be completing our citation lesson with Part Two covering the Blue Book.



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Deadline: Application must be received 60 days prior to examination date. A late application may be accepted up to 30 days prior to the examination if submitted with a \$25 late fee, in addition to the fees listed below, if space is available.

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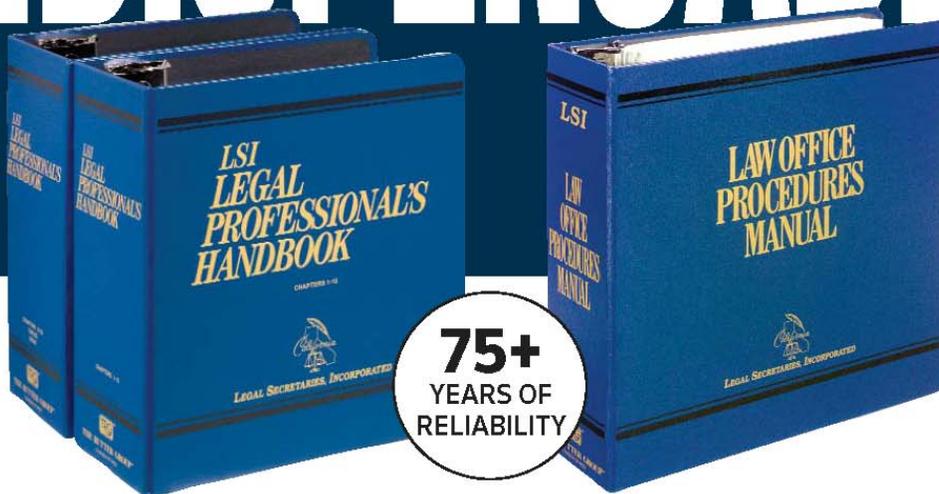
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49	Fresno County	LPA	8	-1	38	45
48	Humboldt County	LPA	5		35	40
37	Imperial County	LPA	14		26	40
27	Livermore-Amador Valley	LPA	6		21	27
64	Long Beach	LSA	20		52	72
46	Los Angeles	LSA	7		36	43
17	Marin County	LPA	5		12	17
38	Merced County	LPA	10	1	33	44
14	Monterey County	LSA	0		5	5
62	Mt. Diablo	LPA	19		54	73
15	Napa County	LSA			13	13
78	Orange County	LSA	44		50	94
25	Palo Alto	LSA	1		13	14
39	Placer County	LPA	5		15	20
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181	Sacramento	LSA	55		109	164
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43	San Francisco	LPA	22		24	46
31	San Gabriel Valley	LSA	14		19	33
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26	Santa Barbara	LSA	4		22	26
59	Santa Clara County	LSA	35		46	81
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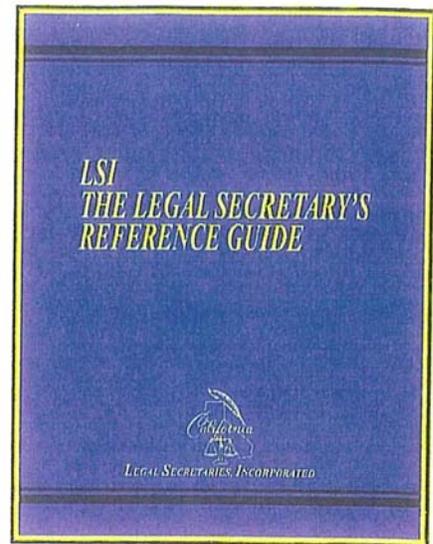
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## Editor's Note

by Liz Gideon, CCLS

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~ Harold R. McAlindon*

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