

## CALIFORNIA CERTIFIED LEGAL SECRETARY PROGRAM

### A. Eligibility

Any person, who has a minimum of 2 years' full-time experience as a legal secretary, or equivalent as approved by the Certifying Board, may apply to take the examination. Membership in Legal Secretaries, Incorporated, is not a requirement to sit for the examination.

### B. Dates

The examination is given in March and October each year on a date to be determined by the Board, generally on the third Saturday of the month.

### C. Application Deadlines

Completed applications must be received by the Board 60 days prior to the examination date. The Board shall acknowledge to the applicant receipt of such application within two weeks following the deadline. Applicants are expected to notify the Board no later than two weeks before the examination date of their inability to be present to take the examination and request a deferment.

### D. Test Centers

One site will be established in the northern portion of the state and one in the southern portion of the state. Testing centers will generally be established in the general geographic areas commonly known as Greater Los Angeles and the San Francisco Bay Area. Specific test sites for each examination will be determined by (1) the most centrally located available site to the registered test applicants; (2) the number of test applicants requesting a specific site; (3) the availability and cost of appropriate testing facilities; and (4) the availability of appropriate proctors. Whenever possible and practical, test site selection preference will be given to law offices and other sites provided at no cost to the Certifying Board.

### E. Examination Contents

The examination covers the following areas:

1. **Ability to Communicate Effectively.** Measures proficiency in written communications, including grammar, punctuation, spelling, word usage, and sentence structure.
2. **California Legal Procedures.** Tests California-specific legal practice and procedural knowledge relating to litigation, real estate, probate and estate planning, corporation, and family law.

3. **Skills.** Tests ability to use legal knowledge effectively and readily in the execution or the performance of specific assignments, including those related to Judicial Council and other legal forms.
4. **Legal Computations.** Tests knowledge of computations made in a legal office, as well as calendaring, court fees and basic bookkeeping, as used in a law office.
5. **Legal Terminology.** Measures knowledge and application of legal terms, California citations, proper abbreviations, and legal resources.
6. **Law Office Administration.** Measures knowledge of records control, including filing procedures, computer technology, techniques, personnel management, formatting of business and legal documents and notary public procedures.
7. **Reasoning and Ethics.** Reasoning verifies the ability to evaluate facts and situations logically and to reach rational conclusions, ethics tests understanding of accepted professional standard of conduct, including accounts management in a law office and notary public issues.

#### F. Partial Retakes

1. To qualify for a partial retake of the examination (other than a retake of all seven sections), a minimum of four sections must be passed at one sitting of the examination. The remaining three or fewer sections may be retaken upon submission of an application and payment of the retake fee partial retake applicants have up to six consecutive regularly scheduled examination dates (three years after the passing the minimum four sections) to pass all of the remaining failed sections before the entire examination must be taken again. All failed sections must be retaken at the time same.
2. The deadline for submission of a retake examination application is 60 days before the examination date or the same as for the complete (full) examination application.
3. Retake applicants are expected to notify the Board at least two weeks before the application deadline date of their inability to site for the retake examination.

## G. Fees

The following fees have been adopted by the Board for LSI members and non-LSI members:

	LSI MEMBERS	NON-LSI MEMBERS
Registration fee	\$ 15	\$ 55
Examination fee	<u>95</u>	<u>95</u>
Total Application fee:	\$110	\$150
Retake fee	\$ 55	\$ 65
Deferral fee	\$ 25	\$ 25

The appropriate fees must be paid each time the complete examination application or retake application is submitted. For instance, if the applicant fails to pass the minimum four sections, the complete application fee of \$110 or \$150, respectively, must be paid again if the applicant is to sit for the full examination. If the applicant is applying to retake one or more failed sections only, the retake fee of \$55 or \$65, respectively, must be paid in order to sit for the failed section(s). The requisite fees must accompany the application.

## H. Deferral and Late Fees

If an applicant, after registering for the full examination or partial retake and paying the appropriate application fees, wishes to postpone taking the full examination or partial retake examination on the date stated in the application to the next examination date, the applicant must submit a completed deferral application and a \$25 deferral fee to the Board prior to the commencement of the full examination or partial retake examination the applicant was scheduled to take. The granting of a deferral by the Board will not in any case extend an applicant's time to pass all seven sections of the examination beyond seven consecutive regularly-scheduled examination dates. In every instance where an applicant fails to take any section of the examination for which the applicant is registered and no deferral application and deferral fee are submitted prior to commencement of the examination, the applicant forfeits all fees previously paid.

Late applications may be accepted up to 30 days prior to an examination date if submitted with a \$25 late fee in addition to the application fees, if space is available.

## I. Refunds

Refunds of the examination fee will be made if requested prior to 60 days before the examination. Refunds after that time will be made for emergency reasons only. The registration fee, however, will not be refunded.

## J. Scoring

A candidate may pass the examination in two ways: (1) if the overall score (the combined score for all 7 sections) is 75 percent or better, or (2) if each individual section is passed with a score of 70 percent or better (retakes allowed if four or more sections passed at one sitting).

Time Limit: All seven sections must be passed within seven consecutive, regularly-scheduled examination dates.

## K. Grading/Mailing Results

The examination will be graded within 6 weeks of the test date and the results electronically mailed to the candidates.

## L. Reference Materials

The Board has adopted and utilizes the following sources in determining the correct answers for the examination. The Board reserves its right to augment this list without prior notification.

### Ability to Communicate Effectively

1. William A. Sabin, *The Gregg Reference Manual*, 10th ed., Glencoe/McGraw-Hill [ISBN 0-07-293653-3].

### California Legal Procedure

1. *LSI Legal Professional's Handbook*, current edition, The Rutter Group, (800) 747-3161.
2. *LSI Law Office Procedures Manual*, current edition, The Rutter Group, (800) 747-3161.
3. Edward W. Jessen, *California Style Manual*, 4th ed. **[for citations only]**, West Group, (800) 328-4880 [ISBN 0-314-2330-9].

### Reasoning and Ethics

1. *The Legal Assistant's Practical Guide to Professional Responsibility*, 2d. ed., American Bar Association, [ISBN 1-59031-392-5]  
[www.ababooks.org](http://www.ababooks.org); [www.amazon.com](http://www.amazon.com)

2. California Business and Professions Code, Chapter 4. ATTORNEYS, Articles 1-15. [www.leginfo.ca.gov/calaw.html](http://www.leginfo.ca.gov/calaw.html)
3. California Code of Civil Procedure, Part 4. Miscellaneous Provisions, Sections 1855-2094. [www.leginfo.ca.gov/calaw.html](http://www.leginfo.ca.gov/calaw.html)
4. California Rules of Professional Conduct, Chapters 1 through 5 (<http://calbar.ca.gov/calbarpdfs/rules>)
5. Debra Bowen, *Secretary of State, Notary Public Handbook*, available online through the State of California, Notary Public Section.

### **Law Office Administration**

1. William A. Sabin, *The Gregg Reference Manual*, 10th ed., Glencoe/McGraw-Hill [ISBN 0-07-293653-3].
2. Mark L. Chambers, *PCs All-In-One Desk Reference for Dummies*, most current edition (Parts 1 through 3)
3. *LSI Law Office Procedures Manual*, current edition, The Rutter Group, (800) 747-3161.
5. *The Legal Assistant's Practical Guide to Professional Responsibility*, 2d. ed., American Bar Association, [ISBN 1-59031-392-5] [www.ababooks.org](http://www.ababooks.org); [www.amazon.com](http://www.amazon.com)
6. Debra Bowen, *Secretary of State, Notary Public Handbook*, available online through the State of California, Notary Public Section.

### **Legal Computations**

1. *LSI Legal Professional's Handbook*, current edition, The Rutter Group, (800) 747-3161.
2. *LSI Law Office Procedures Manual*, current edition, The Rutter Group, (800) 747-3161.
3. California Rules of Court, section 2.
4. California Code of Civil Procedure, sections 1141 and 2025.

### **Legal Terminology**

1. *LSI Legal Professional's Handbook*, current edition, The Rutter Group, (800) 747-3161.
2. *LSI Law Office Procedures Manual*, current edition, The Rutter Group, (800) 747-3161.
3. Edward W. Jessen, *California Style Manual*, 4th ed., West Group, (800) 328-4880 [ISBN 0-314-2330-9]
4. A legal dictionary such as *Black's* or *Gifis's Law Dictionary* by Barron's.

## **Skills**

1. *LSI Legal Professional's Handbook*, current edition, The Rutter Group, (800) 747-3161.
2. *LSI Law Office Procedures Manual*, current edition, The Rutter Group, (800) 747-3161.
3. Edward W. Jessen, *California Style Manual*, 4th ed., West Group, (800) 328-4880 [ISBN 0-314-2330-9]

## **All Sections Utilize the Following:**

1. CCLS mock examinations and study kit, Legal Secretaries, Incorporated, (800) 281-2188, [www.lsi.org](http://www.lsi.org).
2. California Rules of Court.
3. Judicial Council forms.
5. A legal dictionary such as *Black's* or *Gifis's Law Dictionary* by Barron's (for assistance with terms found in the LOPM and LPH).

## SAMPLE TEST QUESTIONS

### Ability to Communicate Effectively

**Directions:** From the following sentence pairs, select the one with the correct punctuation. Assume that all other elements of the sentence are correct and cannot be changed. Darken the bubble corresponding to the letter on your answer sheet.

1. [A] Please fill in the date where indicated with a red "X".  
[B] How many times has he said "I will handle it"?

**Directions:** Look at the following divided words or phrases. Mark the letter of the word or phrase that has been correctly divided. A (/) indicates the division of a phrase. A (-) indicates the division of a word.

2. [A] exper-ience  
[B] congratu-late

**Directions:** Review the following sentences. Some may contain errors in punctuation, grammar, and capitalization. If the sentence is correct, darken the "A" bubble on your answer sheet; if the answer is incorrect, darken the "B" bubble on your answer sheet.

3. Ms. Lopez' application was accepted by the club.

**Directions:** Review each of the following sentences for spelling. If all the words in the sentence are spelled correctly, darken the "A" bubble. If any word is misspelled, dark the "B" bubble.

4. The map shows the boundry between the two properties.

**Directions:** Choose the correct spelling of each of the following pairs of words.

5. [A] abcess  
[B] abscess

**Directions:** Review the following word groups for correct spelling. If all the words in the group are spelled correctly, darken the "A" bubble. If any word is misspelled, darken the "B" bubble.

6. Auxiliary                      conscious                      subtly                      impasse

**Directions:** Review the following sentences. Select the correct word by darkening the letter of the correct word on the answer sheet.

7. [A] Who [B] Whom shall I say is calling?

**Directions:** Review the following sentences for correct number usage. If the sentence is correct as written, darken the "A" bubble. If the sentence is incorrect, darken the "B" bubble.

8. Our responsive pleading is due on April 10<sup>th</sup>.

**Directions:** Review the following sentences for correct usage. Select the correct word form by darkening the letter of the correct word form on the answer sheet.

9. I interviewed a woman [A] aged [B] age 29 for the job.

### California Legal Procedures

**Directions:** Read each question carefully and select the answer that is the most correct. Using the pencil and the answer sheet provided, completely dark the bubble corresponding to your answer.

1. Once served with a summons and petition for dissolution of marriage, a respondent has \_\_\_\_ days to file a response with the court.
- a. 10
  - b. 15
  - c. 20
  - d. 30

**Directions:** Read each statement carefully and decide whether it is true or false. On the answer sheet provided, dark the bubble "A" if it is TRUE and "B" if it is FALSE.

2. A Civil Case Cover Sheet is required for all First Papers filed in an action.

## Reasoning and Ethics

**Directions:** Read each question carefully, and select the answer that is most correct. Using the No. 2 pencil and the answer sheet provided, completely darken the bubble corresponding to your answer.

1. The opposing side in a transaction sends your office the stock certificates your client purchased in the deal. You open the package containing the certificates. What duties does your law office have?

- [A]** Notify the client to pay any charges associated with the stock certificates.
- [B]** Send the certificates to the client.
- [C]** Identify and label the securities upon receipt, and place them in a safe deposit box or other place for safekeeping as soon as possible.
- [D]** Maintain the records for a year.

**Directions:** Read each statement carefully and decide whether it is true or false. Using the No. 2 pencil and the answer sheet provided, completely darken the bubble mark "A" if the statement is true and the bubble marked "B" if the statement is false.

2. There is no duty to maintain confidences until an attorney/client relationship is established.

- [A]** True
- [B]** False

**Directions:** Read each question carefully, and select the answer that is most correct. Using the No. 2 pencil and the answer sheet provided, completely darken the bubble corresponding to your answer.

3. The \_\_\_\_\_ provides only limited protection from disclosure.

- [A]** Work product privilege
- [B]** Ethical wall
- [C]** Attorney-client privilege

**Directions:** Read each situation carefully and select the option that is most correct. Using the No. 2 pencil and the answer sheet provided, completely darken the bubble corresponding to your answer.

4. You often tell your husband about the estates with which you are involved at work. You believe that so long as you don't tell your husband the names (you refer to the cases as "Mr. A's estate" or "Ms. B's will") you have not divulged any secrets. Which option describes your action?

[A] A legal secretary would show initiative and good judgment doing this.

[B] It would be in appropriate for legal secretary to do this.

[C] It would be unethical for a legal secretary to do this.

### Law Office Administration

**Directions:** Read each question carefully and select the answer which is the most correct. Using the pencil and the answer sheet provided, completely darken the bubble corresponding to your answer.

1. Which of the following is not a computer operating system?

[A] Office XP

[B] Windows XP

[C] Linux

[D] Mac OS

**Directions:** Read each statement carefully and decide whether it is true or false. On the answer sheet provided, darken the bubble "A" if it is TRUE and "B" if it is FALSE.

2. When filing, a single letter comes before a name that begins with the same letter.

[A] True

[B] False

### Legal Computations

**Directions:** Using the calendar provided, select the correct due date for each of the following. Darken the bubble corresponding to the letter on your answer sheet. Blacked out dates are California Superior Court holidays. All dates are calculated using California Superior Court rules and statutes.

1. Trial in a civil action is set for October 15. What is the last day to hear discovery motions?

- [A] September 30
- [B] October 1
- [C] September 28
- [D] None of the above

**Directions:** Using the fee schedule provided, select the correct fee due for each of the following. Darken the bubble corresponding to the letter on your answer sheet.

2. Your client is XYZ Corporation, a Nevada corporation doing business in California. It is time to file the annual statement. What is the filing fee?

- [A] \$25
- [B] \$20
- [C] \$70
- [D] No fee

**Directions:** Read each question carefully and choose the answer which is most correct. Darken the bubble corresponding to the letter on your answer sheet.

3. Assuming a 360-day year and an interest rate of 15 percent per year, how much interest accrues on a \$30,000 note in 120 days?

- [A] \$4,500
- [B] \$375
- [C] \$45
- [D] \$1,500

**Directions:** Read each question carefully and choose the answer which is most correct. Darken the bubble corresponding to the letter on your answer sheet.

4. Accounts receivable and supplies are two examples of a firm's assets.

- [A] True
- [B] False

## Legal Terminology

**Directions:** Read each question carefully, and select the answer that is most correct. Using the No. 2 pencil and the answer sheet provided, completely darken the bubble of your answer.

1. Georgia

- [A] Ga.
- [B] GA
- [C] Georgia
- [D] None of the above.

**Directions:** Read each statement carefully, and decide whether it is true or false. Completely darken the bubble mark "A" if the statement is true or "B" if the statement is false.

2. A trustee is the beneficiary of a trust.

- [A] True
- [B] False

**Directions:** Read each questions carefully, and select the answer that is most correct. Using the No. 2 pencil and the answer sheet provided, completely darken the bubble corresponding to your answer.

3. To publish or announce officially is to \_\_\_\_\_.

- [A] incorporate
- [B] pretermit
- [C] promulgate
- [D] arraign

**Directions:** Read across the columns. Answers are identified at the top of each column with the letters "A" through "C." Locate the correct abbreviation in each line.

4.	A	B	C
	Probate Code	(P.C.)	(Prob. C.)
		(Prob. C.)	(Prob. Code)

## **Skills**

**Directions:** You will be given a package including a memo, case profile and Judicial Council forms, in different fields of the law practice. The memos will provide specific instructions to the legal secretary from the attorney. You will be directed to prepare documents for the attorney according to the memo.