

## CALIFORNIA CERTIFIED LEGAL SECRETARY PROGRAM

### A. Eligibility

1. 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.
2. 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, usually on the third Saturday of the month.

### C. Application Deadlines

A candidate's completed application form and any requested attachments must be received by the Certifying Board 60 days prior to the examination date. A candidate must notify the Certifying Board if she or he will not be present on the examination date. An application for deferral to the next examination date may be submitted to the Certifying Board with the proper fee and in accordance with the operating rules of the Certifying Board.

### D. Test Sites

Permanent test sites have been established in the Northern California and Southern California areas. Notice of the address of the test site to which a candidate must report is mailed to each candidate approximately 30 days prior to the examination date. Additional test sites may be established pursuant to the Certifying Board's operating rules.

### E. Examination Contents

1. **Ability to Communicate Effectively.** This section measures the candidate's proficiency in written communication, including grammar, punctuation, spelling, word usage, and sentence.
2. **California Legal Procedures.** This section tests the candidate's knowledge of California legal practice and procedure and focuses on the areas of litigation, real estate, probate and estate planning, corporate, and family law.
3. **Skills.** In this section of the examination, the candidate reviews instructions and uses her or his knowledge of legal practices and procedures to identify correctly completed assignments in the areas of litigation, real estate, probate and estate planning, corporate, and family law.
4. **Legal Computations.** This section tests the candidate's knowledge of computations made in a legal office, as well as basic accounting terminology and principles, records and accounts management as used in a law office.

5. **Legal Terminology.** This section tests the candidate's knowledge and understanding of the proper forms of legal citation based on the *California Style Manual* and the candidate's knowledge of legal terms.
6. **Law Office Administration.** This section tests the candidate's knowledge of records management, office equipment and supplies management, computer technology, office etiquette, and personnel management.
7. **Reasoning and Ethics.** The reasoning portion of the examination verifies the candidate's ability to evaluate facts and situations logically and to reach rational conclusions; the ethics portion tests the candidate's understanding of accepted professional standards of conduct.

**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 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 same time.
2. The deadline for a retake application is the same as the deadline for receipt of an application to take the full examination.
3. A retake candidate must notify the Certifying Board if she or he will not be present on the examination date.

**G. Fees**

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

The appropriate fees must be submitted with an application to sit for the complete examination, to sit for a retake of 3 or fewer sections of the examination, or to defer taking all of the examination (or part of the examination if the candidate is in retake mode) to the next test date. If a candidate does not pass 4 or more sections, an application to sit for the complete examination and full registration/examination fees must be submitted to the Certifying Board before the candidate will be permitted to sit for the examination again.

**H. Refunds**

A refund of the examination fee may be requested no later than 60 days prior to the examination date. The Certifying Board will decide on a case-by-case basis whether to refund an examination fee if request is made less than 60 days prior to the examination date **and** if the request is made by the candidate because of an emergency or health reason. In no event will the registration fee be refunded.

## I. Scoring

A candidate may pass the examination in two ways: an overall score of 75 percent or better or a score of 70 percent or better on each individual section (retakes allowed if four or more sections passed at one sitting).

## J. Grading/Mailing Results

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

## K. Suggested 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. *California Style Manual*, 4th ed. [for citations only], West Group, (800) 328-4880.

### **Ethics and Reasoning**

1. The State Bar of California *Rules of Professional Conduct and Handbook on Client Trust Accounting*.
2. Business and Professions Code section 6000 et seq.; Evidence Code section 900 et seq.; Code of Civil Procedure section 2018.
3. *The Legal Assistant's Practical Guide to Professional Responsibility*, 2d. ed., American Bar Association [ISBN 1-59031-502-2]
4. Deborah Orlik, *Ethics for the Legal Professional*, 5<sup>th</sup> ed., Marlen Hill Publishing, 2004 [ISBN 0-9633276-3-1]
5. Fulton-Calkins & Stulz, *Procedures and Theory for Administrative Professionals*, 5<sup>th</sup> ed., SouthWestern Publishing [ISBN 0-538-72740-3]; workbooks available [ISBN 0-538-72743-8].

### **Law Office Administration**

1. West, Debbie, *Records Management*, 2002, EMCParadigm ([www.emcp.com](http://www.emcp.com)) [ISBN 0-7638-1328-1].
2. Stroman, James, Wilson, Kevin, and Wauson, Jennifer, *Administrative Assistant's & Secretary's Handbook*, 2<sup>nd</sup> ed., American Management Association, 2003 [ISBN 0-8144-0784-6].

3. Fulton-Calkins & Stulz, *Procedures and Theory for Administrative Professionals*, 5<sup>th</sup> ed., SouthWestern Publishing [ISBN 0-538-72740-3]; workbooks available [ISBN 0-538-72743-8].
4. Mark L. Chambers, *PCS All-In-One Desk Reference for Dummies*, most current edition [ISBN 0764539418]

### **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. Any general accounting/bookkeeping text. Some suggestions are McQuaig, *College Accounting*, current edition, Houghton Mifflin Company; *Bookkeeping the Easy Way* or *Accounting the Easy Way*, Barron's Educational Series, Inc. (found in any large bookstore).

### **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. *California Style Manual*, 4th ed. **[for citations only]**, West Group, (800) 328-4880.
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. *California Style Manual*, 4th ed. **[for citations only]**, West Group, (800) 328-4880.

### **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.
4. *The Legal Secretary* magazine and legal specialization newsletters.
5. A legal dictionary such as *Black's* or *Gifis's Law Dictionary* by Barron's.

## SAMPLE TEST QUESTIONS

### Ability to Communicate Effectively

**Directions:** Reading across the columns, locate the misspelled word or abbreviation in the row, and mark the selection on the answer sheet.

- |    | <b>A</b>  | <b>B</b> | <b>C</b> |
|----|-----------|----------|----------|
| 1. | beginning | basicy   | sq in    |

**Directions:** Read the following sentence, and select the correct answer in parentheses.

2. We were angry **[A]** with **[B]** about a situation we could not foresee.

**Directions:** Read each sentence or question and select the answer that is most correct.

3. A. These facts must be included, (1) sales \$40000, (2) costs \$30000, (3) profits \$10000.
- B. These facts must be included--(1) sales \$40,000; (2) costs \$30,000; (3) profits \$10,000.
- C. These facts must be included: (1) sales, \$40,000; (2) costs, \$30,000; (3) profits, \$10,000.

### California Legal Procedures

**Directions:** Read each question carefully, and select the most correct answer.

4. A party is not permitted to schedule a deposition:
- A. Until after it has served and received answers to interrogatories.
- B. If another party has already scheduled a deposition.
- C. Without leave of court if trial is set within 30 days after the deposition.
- D. Until all defendants have appeared in the action.

### Legal Computations

**Directions:** Read each question carefully, and select the answer that is most correct.

5. Your client has purchased a new home for \$250,000. What is the documentary transfer tax if the documentary transfer tax rate is \$1.10 per \$1000 in sales price?
- A. \$250
- B. \$262.50
- C. \$275
- D. \$283.50

### Legal Terminology

**Directions:** Read each question carefully, and select the most correct answer.

6. A primary source of law is:
- A. American Jurisprudence Third.      B. Witkin, *California Procedure*.
- C. Written constitutions.              D. Trial transcripts.

## Law Office Administration

**Directions:** Read each question carefully, and select the most correct answer.

7. The filing system requiring the most judgment is:
- |    |                    |    |                    |
|----|--------------------|----|--------------------|
| A. | Numeric filing.    | B. | Subject filing.    |
| C. | Geographic filing. | D. | Alphabetic filing. |

## Reasoning and Ethics

**Directions:** Read each statement carefully, and decide whether it is true or false. If it is true, mark **A** on the answer sheet; if it is false, mark **B** on the answer sheet.

8. The secretary has ultimate responsibility for the attorney's calendar.