

STANDARDS FOR RECERTIFICATION

1. **Definitions.** The following definitions apply to the standards listed below:
 - a. **Certifying Board.** Reference to the Certifying Board is to the California Certified Legal Secretary Certifying Board, an autonomous board established by Legal Secretaries, Incorporated, a California nonprofit mutual benefit corporation.
 - b. **Continuing Education.** Each person who attains California Certified Legal Secretary ("CCLS") status shall complete required continuing education programs which present material that has significant practical content for legal support staff.
 - c. **Certification Term.** Certification is for a three-year period which terminates on the date indicated in the notice of certification or recertification. If certification was originally granted under the grandfathering provisions of the CCLS program, the original certification period expired on March 31, 1992.
 - i. **Example 1:** If the entire examination (including retakes) is successfully completed on October 19, 2004, the certification term expires on October 31, 2007.
 - ii. **Example 2:** If recertification is granted effective November 1, 2005, the certification term expires on October 31, 2008.
 - d. **Credit Hours for Participants.** For each hour of instruction received at an educational program approved by the Certifying Board, the applicant for recertification shall receive 1 credit hour. Fractional credit hours may be given for programs which are between one-quarter hour and an hour in instructional duration. Educational courses more than 1 hour in duration shall qualify for matching credit hours. Educational courses which last for a quarter or a semester shall be given credit hour value according to unit value. If a course is a semester in duration and is taken for three semester units, it shall have a value of three credit hours. Three quarter units equals 2 semester units in computing credit hours. For graded courses, credit hours are only given if the course is passed with a C grade or better.

To qualify for recertification credit, any program, course of study, or class of an hour or more duration must have a substantive handout. If there is no substantive handout for such a program, no credit will be given for the program, course of study, or class taught.

- i. **Example 1:** The applicant attends a local LSI association meeting where the educational speaker instructs for 10 minutes. This shall not qualify for CCLS recertification credit.
- ii. **Example 2:** The applicant attends a quarterly LSI Legal Specialization Section meeting which begins at 4:30 p.m. and ends at 5:45 p.m. The educational speaker's portion of the program begins at 4:45 p.m. and ends at 5:30 p.m. This shall qualify for 0.75 credit hour.
- iii. **Example 3:** The applicant attends an all-day educational forum. Registration begins at 8 a.m.; the educational speaker begins instruction at 9 a.m.; there is a break at 10:30 a.m., and the speaker resumes at 10:45 a.m.; the speaker stops at noon for the lunch break; and the speaker

resumes at 2 p.m., ending the program at 3:30 p.m. This shall qualify for 4.25 credit hours.

- iv. **Example 4:** The applicant takes a course in legal research for five quarter units and passes the class with a B grade. The applicant receives (5)(2/3) credit hours, or 3.33 credit hours, for the course.
- e. **Credit Hours for Self-Study Audio/Video Tapes.** CCLS recertification credit may be obtained through self-study by listening to audio or watching videotaped legal education courses approved by The State Bar of California for MCLE credit. Such credit hours shall not exceed 5 credit hours in any recertification period. All restrictions concerning credit hours apply to audio/video tape instruction. Credit hours may be claimed by completion of a declaration under penalty of perjury as printed on the reverse side of the Certificate of Attendance.
- f. **Credit Hours for Instructors.** Except as provided below, the instructor of an approved program shall receive CCLS recertification credit, within the curriculum category, at the rate of three (3) times the credit hours granted an attendee for that educational program for the first time the instructor presents the program and 1 credit hour for every hour of instruction for each subsequent presentation of the same program. If the instructor is part of a panel and a specific presentation time is not assigned to that instructor, then the total number of hours of instruction time shall be divided by the number of presenters, and an instructor's credit hours shall be computed using the resulting fraction.

A chair or moderator of a panel who does no more than introduce the panelists or present administrative information is not entitled to CCLS recertification **instructional** credit for presentation and preparation time, but if that chair or moderator is in attendance for the whole program, the chair or moderator shall receive credit at the same rate as other attendees of the educational program.
- i. **Example 1:** An applicant for recertification prepares and presents material which has significant practical content for attendees. The course is 3 hours long, and instruction time is 2.5 hours. The instructor will receive 7.5 credit hours the first time the course is presented and 2.5 credit hours for each subsequent presentation of the same material.
- ii. **Example 2:** An applicant for recertification prepares and presents material as part of an all-day seminar approved for 8 credit hours. The applicant is one of four panelists, none of whom has been allotted a specific amount of time to make a presentation. The applicant will receive 6 credit hours the first time the seminar is presented and 2 credit hours for each subsequent presentation of the same material made by the applicant.
- g. **Teaching CCLS Study Group.** The instructor of a CCLS Study Group shall receive a maximum of three (3) credit hours in any 3-year recertification period. The instructor must complete a Certification For Instructional Credit Hours.
- h. **Credit Hours for LSI Publications Revision Committee.** The work of the members of the LSI Publications Revision Committee ("PRC") to revise and update the *LSI Legal Professional's Handbook* and *Law Office Procedures Manual*, as required annually by changes in legislation and Judicial Council forms, qualifies as continuing education pursuant to paragraph 1b above. LSI members serving on the PRC shall be entitled to five (5) hours continuing education credit for each operating year they serve on the PRC.

- i. **Other Credit Hours.** Education not falling within one of the categories described above will be considered by the accreditation committee of the Certifying Board on a case by case basis.
 - j. **Retired.** A CCLS will be considered retired when that CCLS is no longer working in the legal secretarial profession on a part-time, full time, permanent, or temporary basis. Should a retiree return to work, then it is necessary to notify the Board and reactivate the continuing education requirements.
 - k. **Out of State Status.** A CCLS who moves out of state, upon notifying the Board of the same, can put a hold on continuing education requirements; however, upon returning to California, the CCLS must notify the Board within 60 days and continue with these requirements.
 - l. **Inactive Status.** A CCLS who is no longer working in the field may, upon notifying the Board, change his/her status to inactive and put a hold on continuing education requirements. The CCLS will not be able to use the CCLS designation during this time. If the CCLS returns to employment in the legal field, the CCLS must notify the Board immediately and continue with these requirements.
2. **Recertification.** A CCLS shall submit an application for recertification on or before the date the applicant's current certification term expires. An envelope or other type of document holder containing the recertification application, original Certificates of Attendance, and requisite fee, which is postmarked on or before the due date shall be accepted. If a method of one- or two-day delivery service is used, the date indicated on the document holder as the date the applicant submitted the application and fee for delivery shall be on or before the due date. Credit hours submitted in excess of fifteen per certification term shall not be applied to a subsequent certification term.

All certificates of attendance which were issued during the recertification period should be included with the application. **Applicants may not sign their own certificates of attendance.**

Only the following types of certificates will be accepted. Applicants are strongly urged to obtain and submit the standard CCLS Certificate of Attendance whenever possible:

- a. CCLS Certificates of Attendance.
- b. CCLS Certificates of Completion (for self-study programs).
- c. CCLS Certificates for Instructional Credit Hours.
- d. MCLE Certificates if co-signed by the provider or the CCLS's supervising attorney. (The provider must be an approved provider).

PLEASE NOTE: With respect to paragraph d above, applicants may, in the alternative, have their supervising attorney sign a CCLS Certificate of Attendance and attach it to the MCLE Certificate.

3. **Application for Recertification.**

- a. The Certifying Board will send out notices and applications six to eight weeks prior to expiration of the certification term, but it shall be the responsibility of the CCLS whose certificate is expiring to contact the Certifying Board to obtain an application if none is received by mail. The address from which to make inquiry of the Certifying Board may be obtained from the administrator of Legal Secretaries, Incorporated,

whose current telephone numbers are (707) 725-1344 and (800) 281-2188 or from the LSI website <www.lsi.org>.

- b. A person who allows her or his certification to lapse for failure to complete the minimum mandatory continuing education programs and/or fails to submit a timely application for recertification (with attached Certificates of Attendance) with the requisite fee, shall no longer use the CCLS designation unless that person, after lapse of her or his certification, applies for and passes the CCLS examination. If a CCLS is disabled for a period of time such that she or he cannot attend continuing education classes or if a CCLS has medical or personal problems which affect the CCLS's ability to meet the continuing education requirements in a timely manner, that CCLS shall apply to the board prior to the expiration date of her or his current certification for an extension to complete the mandatory continuing education. Such an extension shall not extend the CCLS's subsequent recertification anniversary dates. No application for extension shall be considered after expiration of a CCLS's current certification period.
 - c. A CCLS who retires from the legal secretarial profession or who becomes an attorney shall advise the Certifying Board of that change in status. The retired CCLS or attorney/CCLS will no longer be required to complete credit hours or to apply for recertification.
4. **Required Credit Hours.** Each CCLS shall complete 15 credit hours of approved continuing education during each certification term. It is the responsibility of the individual CCLS to complete a Certificate of Attendance and submit it to the sponsor of the educational program for signature verifying the CCLS's attendance at the program. Educational programs must focus on the duties of legal support staff. Of the required 15 credit hours, no more than 6 credit hours will be allowed for education regarding administrative and/or mechanical (legal secretarial science) functions performed by legal support staff, and of those 6 hours, no more than 2 credit hours shall be allowed for educational courses where the topics are not unique to work done by legal support staff. It therefore is possible that courses which are approved for a specified number of credit hours will not be given full credit by the Certifying Board.
- (1) Example 1: A CCLS attends an approved 3-hour course on collection of judgments. This qualifies for 3 credit hours.
 - (2) Example 2: A CCLS attends an approved 8-hour course on word processing techniques for legal document assembly. This qualifies for 6 credit hours. Two months later, the same CCLS attends an approved 8-hour course entitled "Hard Disk Management." This qualifies for zero credit hours as the CCLS has used up the 2-credit hour allotment as defined above, and the course was not specifically concerned with work done only by legal support staff.
 - (3) Example 3: A CCLS attends an approved 4-hour course on notarization. This qualifies for 2 credit hours, as notarial work is not solely performed by legal support staff.
5. **Approved Providers.** Approved providers are those providers which sponsor educational programs that may qualify for recertification credit. Please note that all educational programs sponsored by a particular approved provider may not qualify for recertification credit. Programs that do not focus on the duties of legal support staff will not qualify for recertification credit. If you have a question regarding a particular program, please contact the Certifying Board Chairman for clarification. Approved provider status has been granted for the following educational programs:

Seminars and workshops sponsored by Legal Secretaries, Incorporated (LSI), its affiliated associations (LSI's member associations), and its Legal Specialization Sections.

Seminars and workshops sponsored by The State Bar of California, its legal specialization sections, and any bar association in California.

Courses and educational programs granted MCLE status by The State Bar of California.

Courses and educational programs approved for Professional Legal Secretary (PLS) continuing education credit by the NALS.

Bay Area Legal Secretaries Forum (BALSF)

Los Angeles County Forum (LACF)

Horizons Unlimited (Deanna A. Pepe, PLS, CCLS)

Mary M. Alexander, Alexander's Legal Seminars & Publications

Davidson Staffing

Other educational programs to which approved provider status has been granted by the Certifying Board.

6. **Non-Approved Providers.** For non-approved providers, please submit detailed information about the course or program and credit will be determined on the basis as set forth in Paragraph 1d above.