

California Certified Legal Secretary Program

A. Eligibility

1. Any person who has a minimum of three 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 San Francisco and Los Angeles. 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 of the examination measures the candidate's proficiency in written communication, including grammar, punctuation, spelling, word usage, and sentence structure. Testing in this section is provided in two formats: multiple choice and practical review. Both formats must be taken; however, passage of either format is considered passage of the section.
2. **California Legal Procedures.** This section of the examination tests the candidate's knowledge of California legal practice and procedure and is primarily focused 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. **Bookkeeping, Record Keeping, and Computations.** This section of the examination tests the candidate's knowledge of accounting terminology and principles, accounts management, and arithmetical calculations which might be performed in a law office or legal department.
5. **Legal Terminology.** This section of the examination 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. A candidate must pass a minimum of four sections of the examination at one sitting to qualify for a partial retake of the examination (other than a retake of all seven sections). The three or fewer sections which were not passed may be retaken upon submission of an application and the payment of the required retake fee. All unpassed sections must be taken at one sitting, and all seven sections must be passed within seven test cycles, including the test cycle at which the four or more sections were initially passed. See the Certifying Board's operating rules for further details.
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

	LSI Members	Non-LSI Members
Registration fee	\$ 15	\$ 55
Examination fee	<u>95</u>	<u>95</u>
Total:	<u>\$110</u>	<u>\$150</u>
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 three 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 four 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). Please see the Operating Rules for further details.

J. Grading/Mailing Results

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

K. Suggested Reference Materials

1. *LSI Legal Professional's Handbook*, (current edition), The Rutter Group, 15760 Ventura Boulevard, Suite 630, Encino CA 91436.
2. *Law Office Procedures Manual*, (current edition), The Rutter Group, 15760 Ventura Boulevard, Suite 630, Encino CA 91436.
3. Legal Secretaries, Incorporated, Corporate Office, 12842 Hortense Street, Studio City, CA 91604-1123, (800) 281-2188/(818) 769-0123: Study Kit and mock examinations; instructor's guides for the *Law Office Procedures Manual*.

4. The State Bar of California *Rules of Professional Conduct; State Bar Act*, Business and Professions Code section 5000 et seq.; Evidence Code section 900 et seq.; Code of Civil Procedure section 2018.
5. *California Style Manual* (3d ed 1986) **[for citations only]**, Department of General Services, Documents and Publications Unit, P.O. Box 1015, North Highlands CA 95660, (916) 928-4630. **Note: As of May 1999 the third edition is out of print and the fourth edition is expected to be available July 1999.**
6. Sabin, William A., *The Gregg Reference Manual*, 8th ed., McGraw-Hill Companies, Glencoe/Gregg Division, New York, 1992. [ISBN 0 02 803286 1.] \$20.46 as of May 1999. **Note: In order to receive this pricing, indicate if you are a member of LSI and give Corporate Office address and prepay with credit card. Glencoe will drop ship to you and send copy of invoice (prepaid) to LSI office. You may Go on-line for listing of all Gregg workbooks. (Website is www.Glencoe.com. Click the following to get to full listing of Gregg books: Postsecondary Education, Office Technology, Product Information, Business English and Communication. Then on left side of screen arrow down to The Gregg Reference Manual, 3e. Call for current pricing and to place an order.)**
7. 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.; and *Schaum's Outline of Theory and Problems of Bookkeeping and Accounting* Third Edition, McGraw-Hill (found in any large bookstore).
8. Any current book on administrative office policies and procedures. Some suggestions are: Grillot, Peggy J. and Abegg, Lynda R., *Secretary's Portable Answer Book*, Prentice Hall, New Jersey, 1994 [ISBN 0-13-042458-7]; Stroman, J. and Wilson, K., *Administrative Assistant's & Secretary's Handbook*, American Management Association, New York, 1995 [ISBN 0-8144-0273-0]; or Jaderstrom, Susan, Kruk, Leonard, and Miller, Joanne, *Complete Office Handbook*, 2d ed., Random House, New York, 1997 [ISBN 0-679-77038-0].
9. Diamond, Susan Z., *Records Management, A Practical Guide*, 3d ed., American Management Association, New York, 1995, [ISBN 0-8144-0295-X].
10. Any current book on the Internet and other computer technology. Some suggestions are: Quercia, Valerie, *Internet in a Nutshell*, O'Reilly & Associates, Inc., Cambridge, 1997 [ISBN 1-56592-323-5]; Levine, John R., Young, Margaret Levine, and Reinhold, Arnold, *the Internet for Dummies*,

Quick Reference, 3d ed., IDG Books Worldwide, Inc., Foster City, California, 1997, [ISBN 0-7645-0110-0]; Pfaffenberger, Bryan, *Webster's New World Pocket Internet Directory and Dictionary*, Simon & Schuster, Inc., New York, 1997, [ISBN 0-02-861889-0].

11. California Rules of Court.
12. Judicial Council forms manual.
13. ARMA rules of filing, ARMA International Association of Records Managers and Administrators, 4200 Somerset, Suite 215, Prairie Village, KS 66208, (913) 341-3808.
14. A legal dictionary such as *Black's* or *Gifis's Law Dictionary* by Barron's.
15. California 1999 Notary Public Handbook. Write to Secretary of State, P.O. Box 942877, Sacramento, CA 94277-0001. Include self-addressed, stamped 6" by 9" envelope with 77 cents postage. Questions, call (916) 653-6814.

Additional Study Material

For study of substantive law matters, all Continuing Education of the Bar Publications (2300 Shattuck Avenue, Berkeley, CA 94704) and The Rutter Group practice guides are recommended.