



LPI

*Educating California's
Legal Support Professionals*



CALIFORNIA CERTIFIED LEGAL SECRETARY

Legal Professionals, Incorporated

What is the California Certified Legal Secretary?

The California Certified Legal Secretary (“CCLS”) is a program sponsored by Legal Professionals, Incorporated, which tests qualified legal support staff in various areas of law, ethics, practical work product, and office administration. The program is administered by the California Certified Legal Secretary Certifying Board.

To attain their certification, the examinees must pass a rigorous and detailed 8-hour exam, offered twice a year.

Every three years, continuing legal education requirements must be met to maintain certification.



ARE YOU
ELIGIBLE?

Who Is Eligible to Take the CCLS Exam?

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 exam. Membership in Legal Professionals, Incorporated is not a requirement to take the exam.



Time for Exams

What is covered in the CCLS Exam?

- ❖ California Legal Procedure
- ❖ Legal Terminology
- ❖ Legal Computations
- ❖ Skills
- ❖ Ability to Communicate Effectively
- ❖ Reasoning and Ethics
- ❖ Law Office Administration

California Legal Procedure

California Legal Procedure covers six areas of law:

- ❖ Civil Litigation
- ❖ Probate/Estate Planning
- ❖ Family Law
- ❖ Corporations
- ❖ Real Estate
- ❖ Federal Civil Procedure (coming soon)

For this section, examinees will need to study the *Law Office Procedures Manual*. The secondary source of information is taken from the *Legal Professional's Handbook*.



Legal Terminology

Legal Terminology covers proper format of citations and abbreviations, as well as terminology from the six areas of law covered in California Legal Procedure.

For this section, examinees will need to study the *California Style Manual* and *Law Office Procedures Manual*.



Legal Computations



Legal Computations covers several types of computations performed every day by legal support staff:

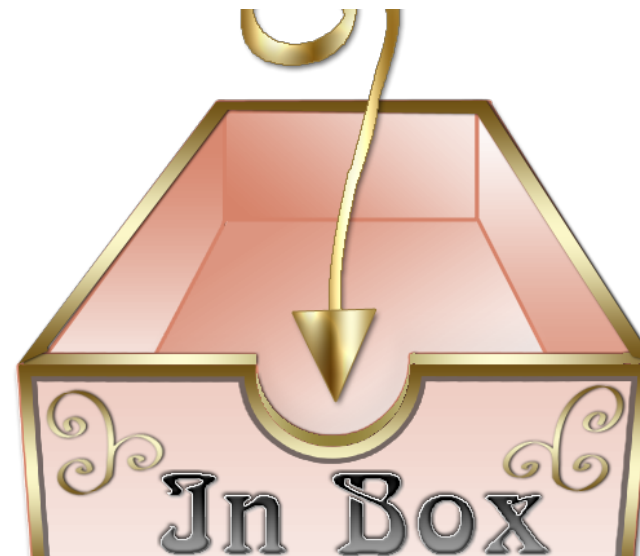
- ❖ Practical calendaring of due dates and hearings
- ❖ Ability to determine appropriate filing fees in various areas of law
- ❖ Basic math calculations done in everyday practice

For this section, examinees will need to study the *Law Office Procedures Manual*. Examinees may also choose to study a primer on basic math.

Skills

Skills is an exercise in which the examinee is given an instructional memo and a form. Based on the question, the examinee must answer from a list of multiple choices the correct information to fill in a specific part of the form. This section is designed to test an examinee's ability to follow directions and to proofread.

For this section, examinees will need to study the *Law Office Procedures Manual*.



Ability to Communicate Effectively

The Ability to Communicate Effectively section of the CCLS exam is designed to test an examinee's ability to use correct punctuation, grammar, spelling, and word usage.

For this section of the exam, examinees will need to study *The Redbook: A Manual on Legal Style* (4th ed. or later).



Reasoning and Ethics



Reasoning verifies an examinee's ability to evaluate facts and situations logically and to reach rational conclusions. Ethics tests their understanding of accepted professional standards of conduct, including accounts management in a law office and notary public issues.

For this section of the exam, examinees will need to study the *Pocket Guide to Legal Ethics*, California Business and Professions Code (Chapter 4), California Code of Civil Procedure (Part 4), California Rules of Professional Conduct (Chapters 1-5), and the *California Notary Public Handbook*.

Law Office Administration

Law Office Administration covers the following areas:

- Alphabetic filing
- Computer use and terminology
- Notary Public practices
- General office procedures

For this section of the exam, examinees will need to study *The Redbook: A Manual on Legal Style*, *Computers Made Easy: From Dummy to Geek*, *Law Office Procedures Manual*, the *Pocket Guide to Legal Ethics*, and the *California Notary Public Handbook*.





Grading and Passing the Exam

The CCLS exam is a multiple-choice and/or true/false exam. The test is given via Zoom using ClassMarker software. Following an extensive review process by the California Certified Legal Secretary Certifying Board, results are finalized and sent to the examinees. There are two ways to pass the exam:

1. Attain a score of at least 70% on each section of the Exam, or
2. Attain an overall score of at least 75% when averaging the scores on each section of the Exam

Partial and Full Re-Takes



If an examinee passes at least 4 sections of the exam with a score of 70% or better, that examinee only needs to re-take those sections which were not passed. The examinee will need to pass the remaining sections with a score of at least 70% on each section.

Examinees must pass the full exam within the next 6 consecutive regularly scheduled exam dates from passing the minimum 4 sections.

If an examinee does not pass at least 4 sections, they will need to re-take the entire exam.

Exam Review

When an examinee does not pass the entire exam, they may review just those sections of the exam that they did not pass with a score of 70% or better.

Examinees must request an exam review within 20 days of receipt of their exam results, using the form provided with their results.

Examinees will have 90 minutes to review the exam but may have more time at the discretion of the Certifying Board.



After Passing the Exam

PASSED

After passing the CCLS exam, CCLSs must recertify every three years. In order to recertify, a CCLS must complete 15 hours of continuing education, as follows:

- A minimum of 15 credit hours of approved education. Of that 15 hours, no more than 5 hours may be self-study
- Of that 15 hours, a maximum of 6 hours may be regarding administrative and/or mechanical functions performed by legal support staff
- Of those 6 hours, no more than 2 hours shall be allowed for educational courses where topics are not unique to work done by legal support staff (e.g., notary class)



Study Options

There are various options for studying for the exam:

1. Join a local association study group - you can contact your local association or the LPI CCLS Chair to find out if a group is offered in your area.
2. Join the LPI Online Study Group - if no local group is offered or the class schedule doesn't meet your schedule, you can join the LPI CCLS Online Study Group. Information can be found on the LPI website.
3. Study on your own - If you prefer to study on your own, the CCLS Study Kit available on LPI's website will provide you with information and guidance for studying on your own.
4. Study with a buddy - this can be done in person, or via telephone or online meeting.



Benefits to the Employer

- ▶ A well-rounded employee who has knowledge of several areas of law - your employee will have enough knowledge in various areas of law that will allow him or her to jump in and assist on cases that may not be in the firm's usual practice area.
- ▶ A professional employee - a CCLS must maintain continuing education credits and pass a rigorous exam in order to maintain their certification.
- ▶ A quick reference - a CCLS will have a wealth of knowledge ready to answer questions and assist others, or if he or she does not know the answer, they know where and how to find it quickly.



Benefits to the Employer (Cont.)



- ❖ A self-confident employee - a CCLS has passed a very difficult and thorough exam. Passing the exam increases their self-confidence, which improves efficiency and boosts their morale.
- ❖ A pre-screened potential employee - when hiring employees, if they are a CCLS, you will know that they already have knowledge in many areas of law, and that they have passed an exam that thoroughly tests them on that knowledge.

Benefits to the Employee



- ▶ Self-confidence - this is a rigorous exam, and passing it is quite an accomplishment.
- ▶ Knowledge - gaining knowledge in several areas of law will make you a more valuable employee; you will be able to jump in and assist with those odd cases that come in that may not be in the firm's usual practice areas.
- ▶ Recognition as a professional - you will gain recognition among employers and your peers for being a professional, required to pass a rigorous exam and obtain continuing education.
- ▶ Marketability - as a CCLS, you will have already demonstrated to a potential employer that you have knowledge in many areas of law and have passed an exam that thoroughly tests you on that knowledge.

Excerpt of Testimonial of Vivian Shreve, CCLS

Santa Clara County LPA

“. . .To sum it all up, the CCLS exam was by far the hardest thing I’ve ever had to study for. I often tell people it is the hardest exam a non-attorney professional will ever have to take. It is like studying for the LSATs or the Bar exam. But passing it has made it all worth it. My confidence level has skyrocketed. The respect that I get from my employer and co-workers has been amazing. And the opportunities that it has opened up for me have been incredible. And I’ve gotten more job offers than I can count. In this day and age, knowing that you are a little more marketable goes a long way. I’m not worried about my job here right now, but I’ve survived several rounds of layoffs. Having the CCLS helps me to know that if something should happen and I lose my job here, I know that I can go elsewhere and have no problem finding another job. CCLS looks great on your résumé.”

[Apply today!](#)

CCLS Certification: An Attorney's Perspective

When I got my first job with a law firm, even before I passed the Bar Exam, I was repeatedly told to listen to and learn from my legal secretary because they knew more about the practice of law than I did. Having had the added benefit of being married to a legal secretary at the time (who worked at the same firm), I knew it was true. And if I ever forgot, my wife would remind me. However, I also pretty quickly discovered that the skills, quality, training and experience of the various legal secretaries that I would come to work with in my career varied dramatically. I worked with a number of secretaries who had been in the profession for many years, but who lacked the confidence, skills, knowledge and resources to be effective team members - in many ways making my job harder rather than easier.

When we formed Messing Adam & Jasmine several years ago, we brought with us from our previous firm three secretaries for our Sacramento office (Lynne Prescott, Heather Rodriguez, and Lacy Monserrat), two of whom had already achieved the CCLS designation, and one who had been working toward it and achieved the designation shortly after we formed the firm. Now closing in on my 20th year of practice, I can comfortably say that our CCLS-certified staff is the best team of legal secretaries I have ever worked with, and there are several things that reflect this:

(Cont'd)

- ❖ The overall quality of their work is higher.
- ❖ They have a level of confidence and willingness to question (appropriately) attorneys they are working with in order to make sure everything is being done correctly.
- ❖ I rarely have to deal with significant mistakes, and when the inevitable mistake does happen, I'm presented with solutions and fixes.
- ❖ The CCLS network is also a great resource that our legal secretaries can draw from when a particularly complicated issue arises.
- ❖ Of course, people work for a paycheck. But for many people, it seems like they couldn't care less what they were doing to earn that paycheck. The CCLS-certified secretaries I have the pleasure of working with on a daily basis are truly part of the team, are professional, responsible, and truly care about the work they are doing.

By Jason Jasmine, Esq.

For additional information:

- ❖ Legal Professionals Incorporated website - www.legalprofessionalsinc.org
- ❖ LPI California Certified Legal Secretary chair - cclschair@legalprofessionalsinc.org
- ❖ California Certified Legal Secretary Certifying Board - certifyingboard@legalprofessionalsinc.org or send inquiry through LPI's website
- ❖ Local associations - see list located on LPI's website

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