



California Certified Legal Secretary
A Program of LPI®



STANDARDS FOR RECERTIFICATION

1. **Definitions.** The following definitions apply to the standards listed below:
 - a. **Board.** The California Certified Legal Secretary Certifying Board (“Board”) is an autonomous board established by Legal Secretaries, Incorporated® (now Legal Professionals Incorporated, “LPI,” a California nonprofit mutual benefit corporation), on November 15, 1986.
 - 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 (3) year period which terminates on the date indicated in the notice of certification or recertification.
 - i. Example 1: If the entire examination (including retake(s)) is successfully completed on September 20, 2017, the certification term expires on September 30, 2020.
 - ii. Example 2: If recertification is granted effective March 21, 2020, the certification term expires on March 31, 2023.

- d. **Recertification Period.** Effective 2020, due to the change of dates of the exam from October to September in 2017, the Recertification periods are now March and September to coincide with the new test dates. Therefore, if the original exam was taken in October (of any year), recertification is in September and all recertification paperwork must be submitted by September 30. For those that took the exam in March (of any year) all recertification paperwork remains due by March 31.
- i. Example 1: If recertification is granted effective November 1, 2017 (exam taken October 2017), the certification term will expire on September 30, 2020.
- e. **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 an 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 Recertification Chair for clarification. Approved provider status has been granted for the following educational programs:
- (1) Seminars and workshops (including online seminars, workshops, or study group sessions) sponsored by Legal Professionals Incorporated (LPI), its affiliated associations (LPI's member associations), and its Educational Council.
 - (2) Seminars and workshops sponsored by The State Bar of California, its Continuing Education Committee, and any bar association in California.
 - (3) Courses and educational programs granted MCLE status by The State Bar of California.
 - (4) Courses and educational programs approved for Professional Legal Secretary (PLS) continuing education credit by the NALS.
 - (5) Other educational programs to which approved provider status has been granted by the Certifying Board.

- f. **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 1e above.
- g. **Status.**
- (1) **Active.** A CCLS is considered active when that CCLS maintains their certification hours and recertifies before their deadline to recertify.
 - (2) **Inactive Status.** A CCLS who is no longer working in the legal 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, and wants to reactivate their certification, the CCLS must notify the Board immediately and continue with these requirements at the direction of the Board.
 - (3) **Retired.** A CCLS will be considered retired when that CCLS is no longer working in the legal profession on a part-time, full time, permanent, or temporary basis. Should a retiree return to work, and wants to recertify, then it is necessary to notify the Board and reactivate the continuing education requirements at the direction of the Board and pay the applicable fee.
 - (4) **Attorney.** A CCLS who becomes an attorney shall advise the Certifying Board of that change in status. The attorney/CCLS will no longer be required to complete credit hours or to apply for recertification.
 - (5) **Moved Out of State.** A CCLS who moves out of state, upon notifying the Board of same, can put a hold on continuing education requirements; however, upon returning to California, and desires to recertify, the CCLS must notify the Board within sixty (60) days upon return to California, and continue with these requirements at the direction of the Board. If said member who moves out of state but continues

to work for a California law firm may continue to recertify.

2. Credit Hours.

- a. **Required Credit Hours.** Each CCLS shall complete fifteen (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 fifteen (15) credit hours, no more than five (5) credit hours will be allowed for self-study and no more than six (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 six (6) hours, no more than two (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.
- i. **Example 1:** A CCLS attends an approved three (3) hour course on collection of judgments. This qualifies for three (3) credit hours.
 - ii. **Example 2:** A CCLS attends an approved eight (8) hour course on word processing techniques for legal document assembly. This qualifies for six (6) credit hours. Two months later, the same CCLS attends an approved eight (8) hour course entitled "Hard Disk Management." This qualifies for no credit hours as the CCLS has used up the two (2) hour allotment, as defined above, as the course was not specifically concerned with work done only by legal support staff.
 - iii. **Example 3:** A CCLS attends an approved four (4) hour course on notarization. This qualifies for two (2) credit hours as notarial work is not solely performed by legal support staff.
 - iv. **Example 4:** The applicant attends a local LPI association meeting where the educational speaker instructs for ten (10)

minutes. This would not qualify for CCLS recertification credit.

v. **Example 5:** The applicant attends a quarterly LPI Education Council program 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 would qualify for .75 credit hour.

vi. **Example 6:** The applicant attends an all-day education forum. Registration begins at 8 a.m., instruction 9 to 10:30 a.m., break from 10:30 to 10:45 a.m., instruction from 10:45 a.m. to noon, lunch from noon to 1:00 p.m., instruction 1:00 p.m. to 2:30 p.m. This would qualify for 4.25 credit hours.

b. **Minimum Credit Hours.** The minimum credit for participation in an approved program is .25 hour. An applicant for recertification shall receive credit as follows:

<u>PARTICIPATION</u>	<u>INSTRUCTION TIME</u>	<u>CREDIT HOURS</u>
Approved Program between .25 and 1 hour	Actual instruction time.	.25, .50, .75, or 1 hour
Approved Program more than 1 hour (MUST HAVE SUBSTANTIVE HANDOUT)	Actual instruction time.	1.25+ hours
3-Unit Semester Course (Grade "C" or better)	3 Units	3 hours
4-Unit Semester Course (grade "C" or better)	4 Units	4 hours
5-Unit Semester Course (grade "C" or better) (the quarter units multiplied by three (3) quarters divided in half:	7.5Units $5 \times 3 = 15$ $15/2 = 7.5$	7.6 hours

- c. **Excess Credit Hours.** Credit hours submitted in excess of fifteen (15) per certification term shall not be applied to a subsequent certification term, and the three (3) year certification anniversary date will not be altered. (Refer to section 2 above for more information about credit hours.)
- d. **Failure to Complete Credit Hours.** A person who allows the 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 copies of Certificates of Attendance) with the requisite fee, shall no longer use the CCLS designation unless that person applies for and passes the CCLS examination. If a CCLS is disabled or has a medical or personal problem which affects the CCLS's ability to meet the continuing education requirements in a timely manner, that CCLS shall apply to the Certifying Board for an extension **PRIOR** to expiration of the current certification period. 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.
- e. **Handouts.** Any program, course of study, or class of more than one (1) hour in duration must have a substantive handout, which must then be submitted along with the Application for Recertification. At the full discretion of the Certifying Board, if there is no substantive handout for a program of more than one (1) hour, either: (a) no credit will be given; or (b) credit will be reduced to a maximum of one (1) hour credit. If the handouts are voluminous, the Certifying Board will accept a copy of the cover page, table of contents, last page, and speaker's biography, and will have the option to request a copy of the entire handout.
- f. **CCLS Credit Hours for Self-Study Audio/Video Tapes and MCLE-Approved Pre-Recorded Webinars.** 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, including those sponsored by LPI and/or its affiliated associations (LPI's member associations). Such credit hours shall not exceed five (5) credit hours in any recertification period. All restrictions concerning credit hours apply to audio, videotape, or pre-recorded webinar

instruction. Credit hours may be claimed by completion of a declaration under penalty of perjury as printed on the Certificate of Completion and co-signed by the provider OR the CCLS's supervising attorney. (The provider must be an approved provider and supervising attorney signatures must be hand- signed – no manufactured or electronic stamps.) A printed Certificate of Attendance is also required pursuant to Section 3.c. below. Applicants may not sign their own Certificates of Attendance.

- g. **CCLS Credit Hours for Participatory Hours/Self Study Hours.** Participatory hours are given to applicants that are physically present in class, sign in, and there is a live person giving instruction and answering questions. A live webinar may also qualify for participatory credit if the instruction is happening in real time. If a webinar were presented in person, and recorded to be used/purchased for later self-study, the recorded webinar would qualify for self-study credit. (See Section 1f above for information on self-study CLE.)
- h. **CCLS Credit Hours for LPI-Sponsored CCLS Study Groups.** CCLS recertification credit may be obtained by participating in a CCLS study group sponsored by Legal Professionals Incorporated (LPI), and/or its affiliated associations (LPI's member associations). Credit hours for LPI- Sponsored CCLS Study Groups (online or other similar formats) shall not exceed 10 (ten) credit hours (exclusive of independent-study time) in any recertification period and live participation shall be confirmed by the instructor. A printed certificate of participation signed by the study group instructor must be provided to claim credit hours.
- i. **CCLS Credit Hours for LPI-Sponsored Live Online Workshops/Seminars.** CCLS recertification credit may be obtained by attending or participating in a live webinar approved by the State Bar of California for MCLE credit, or any online workshop or seminar sponsored by LPI, its affiliated associations (LPI's member associations) and its Education Council. A Certificate of Completion will be required to receive credit hours and is to be signed pursuant to Section 3.c. below. LPI sponsored online workshops, seminars, and study groups may or may not qualify for MCLE credit and, if necessary, will be considered by the Certifying Board on a case-by-case basis.

- j. **CCLS Credit Hours for Instructors.** Except as provided herein, 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 only for the first time the instructor presents the program, and for actual hours 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 three (3) hours long, and instruction time is two point five (2.5) hours. The instructor will receive seven point five (7.5) credit hours the first time the course is presented, and two point five (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 eight (8) credit hours. The applicant is one (1) of four (4) panelists, none of whom has been allotted a specific amount of time to make a presentation. The applicant will receive six (6) credit hours the first time the seminar is presented and two (2) credit hours for each subsequent presentation of the same material made by the applicant.
- k. **Teaching CCLS Study Group.** The instructor of a CCLS Study Group shall receive a maximum of three (3) credit hours in any recertification period. The instructor must complete a Certification for Instructional Credit Hours.

- I. **CCLS Credit Hours for Executive Committee, Executive Officer, Parliamentarian, LPI Publications Revision Committee, Continuing Legal Education Silo, CCLS Chairman, and CCLS Certifying Board.**
- (1) **Members of the Executive Committee, Executive Officer, and Parliamentarian.** The work of the members of the Executive Committee (“EC”), as well as the Executive Officer and Parliamentarian, qualify for continuing education credit pursuant to paragraph 1.b. above. LPI members serving on the EC shall be entitled to five (5) hours continuing education credit for each operating year they serve on the EC.
 - (2) **LPI Publications Revision Committee.** The work of the members of the LPI Publications Revision Committee (“PRC”) to revise and update the LPI 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 1.b. above. LPI members serving on the PRC shall be entitled to five (5) hours continuing education credit for each operating year they serve on the PRC.
 - (3) **LPI Education Council.** The work of the members of the LPI Education Council (“LEC”) qualifies as continuing education pursuant to paragraph 1.b. above. LPI members serving on the LEC shall be entitled to five (5) hours continuing education credit for each operating year they serve on the LEC.
 - (4) **CCLS Certifying Board.** The work of the CCLS Certifying Board qualifies as continuing education pursuant to paragraph 1.b. above and each member serving on the CCLS Certifying Board shall be entitled to five (5) hours continuing education credit for each operating year they serve on the CCLS Certifying
 - (5) **CCLS Chairman.** The work of the Chairman for the California Certified Legal Secretary committee qualifies pursuant to paragraph 1.b. above shall be entitled to five (5) hours continuing education credit for each operating year he/she serves on the CCLS committee.

- (6) **Other Credit Hours.** Education not falling within any of the categories described above will be considered by the accreditation committee of the Certifying Board on a case by case basis.

(7) **Recertification.**

- a. **Deadline Notice.** The Recertification Chair of the Certifying Board will send via email courtesy reminders and applications not less than eight (8) weeks prior to expiration of the certification term. Whether notice is sent or received, it shall be the responsibility of the CCLS whose certificate is expiring to contact the Recertification Chair to obtain an application if none is received. It is very important to keep the Certifying Board and Recertification Chair updated with current contact information for this reason.
- b. **Application for CCLS Recertification.** An active CCLS shall submit an Application for Recertification on or before the date the applicant's current certification term expires. The recommended and preferred method is emailing the documentation to the CCLS Recertification Chair at ccls.cbm1@legalprofessionalsinc.org. Upon review and approval of the application and supporting documentation, a Stripe link will be sent for the applicable fee. Alternatively, a check for the applicable fee payable to "Legal Professionals Incorporated" may be mailed to the Certifying Board Chair as follows:

Maria Bishop, CCLS
3191 Rohrer Drive
Lafayette, CA 94549

- c. **Certificates.** 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. COPIES of ALL Certificates which were issued during the recertification period should be included with the application. **Applicants may not sign their own Certificates. Certificates of Completion co-signed by supervising attorneys MUST be hand-signed. Manufactured and electronic signature stamps will not be accepted.**

Applicants are to retain their original certificates and only submit photocopies of certificates for recertification. The Certifying Board does not require original certificates and if any originals are submitted, they will be returned. However, original certificates must be available for review upon request by the Recertification Chair.

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:

- (1) CCLS Certificates of Attendance (to be signed by the Provider);
- (2) CCLS Certificates of Completion (for self-study programs) to be co- signed by the provider or the CCLS's supervising attorney. (The provider must be an approved provider). **Certificates of Completion co-signed by supervising attorneys MUST be hand-signed. Manufactured and electronic signature stamps will not be accepted;**
- (3) CCLS Certificates for Instructional Credit Hours; or
- (4) MCLE Certificates co-signed by the provider or the CCLS's supervising attorney. (The provider must be an approved provider).

PLEASE NOTE: Applicants may, in the alternative, have their supervising attorney sign a CCLS Certificate of Attendance and attach it to the CCLS Certificate of Completion or MCLE Certificate. The supervising attorney's signature must be made by hand, not manufactured or electronic signature stamps.