





*California Certified Legal  
Secretary*  
A Program of LPI®



## CCLS® INFORMATION KIT

### A. Eligibility

Any person who has a minimum of two (2) years' full-time experience as a legal secretary, or equivalent as approved by the Certifying Board, may apply to take the examination. Membership in Legal Professionals Incorporated ("LPI"), is not a requirement to sit for the examination.

### B. Dates

The examination is given in March and September each year on a date to be determined by the Board, generally on the third Saturday of the month.

### C. Application Deadlines

Completed applications must be received by the Board sixty (60) days prior to the examination date. The Board shall acknowledge to the applicant receipt of such application within two (2) weeks following the deadline. Applicants are expected to notify the Board no later than thirty (30) days before the examination date of their inability to be present to take the examination and request a deferment. Applications and requests to defer due to extenuating circumstances received after the thirty (30) day deadline will be considered by the Board on a case-by-case basis.

### D. Test By Zoom

The test is given using a software program called ClassMarker and is conducted via Zoom. Applicants will be given a Zoom invitation in the week prior to the exam. While on Zoom, a link to each section of the exam will be given in the chat window of Zoom. The link, when clicked on, will take the examinee to the test section. The link has a specific start time and end time.

### E. Examination Contents

The examination covers the following areas:

1. **Ability to Communicate Effectively.** Measures proficiency in written communications, including grammar, punctuation, spelling, word usage, and sentence structure.

2. **California Legal Procedures.** Tests California-specific legal practice and procedural knowledge relating to civil procedure/litigation, real estate, probate and estate planning, corporate law, and family law.
3. **Skills.** Tests ability to use legal knowledge effectively and readily in the execution or the performance of specific assignments, including those related to Judicial Council and other legal forms, and to perform accurate proofreading as required for the legal field. The fields of law that will be covered in Skills are family law, civil litigation, probate, corporations, and real estate.
4. **Legal Computations.** Tests knowledge of computations relating to litigation, real estate, probate and estate planning, corporation, and family law, as well as calendaring, court fees, and basic math skills and computations as used in a law office.
5. **Legal Terminology.** Measures knowledge and application of legal terms, California citations, proper abbreviations, and legal resources.
6. **Law Office Administration.** Measures knowledge of records control, including filing procedures, computer technology, techniques, personnel management, formatting of business and legal documents, and notary public procedures.
7. **Reasoning and Ethics.** Reasoning verifies the ability to evaluate facts and situations logically and to reach rational conclusions. Ethics tests understanding of accepted professional standards of conduct, including accounts management in a law office and notary public issues.

#### **F. Partial Retakes**

1. To qualify for a partial retake of the examination (other than a retake of all seven (7) sections), a minimum of four (4) sections must be passed at one sitting of the examination. The remaining three (3) or fewer sections may be retaken upon submission of an application and payment of the retake fee. Partial retake applicants have up to six (6) consecutive, regularly-scheduled examination dates (three (3) years after passing the minimum four (4) 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 submission of a retake examination application is sixty (60) days before the examination date, or the same as for the complete (full) examination application.
3. Retake applicants are expected to notify the Board at least thirty (30) days before the application deadline date of their inability to sit for the retake examination.

## G. Fees

The following fees have been adopted by the Board for LPI members and non-LPI members:

<b>Make checks payable to “LPI”</b>	<b>LPI MEMBERS</b>	<b>NON-LPI MEMBERS</b>
Registration fee	\$ 25	\$ 75
Examination fee	\$100	\$100
Total Application fee:	\$125	\$175
Partial Retake fee	\$ 60	\$ 70
Deferral fee	\$ 45	\$ 45

The appropriate fees made payable to “LPI,” must be paid each time the complete examination application or retake application is submitted. For instance, if the applicant fails to pass the minimum four sections, the complete application fee of \$125 or \$175, respectively, must be paid again if the applicant is to sit for the full examination. If the applicant is applying to retake one or more failed sections only, the retake fee of \$60 or \$70, respectively, must be paid in order to sit for the failed section(s). The requisite fees must accompany the application.

## H. Deferral and Late Fees

If an applicant, after registering for the full examination or partial retake and paying the appropriate application fees, wishes to postpone taking the full examination or partial retake examination on the date stated in the application to the next examination date, the applicant must notify the Board no later than thirty (30) days before the examination date of their inability to be present to take the examination and request a deferral form, and then submit a completed deferral application and a \$45 deferral fee to the Board prior to the commencement of the full examination or partial retake examination the applicant was scheduled to take. The granting of a deferral by the Board will not in any case extend an applicant’s time to pass all seven (7) sections of the examination beyond seven (7) consecutive regularly scheduled examination dates. In every instance where an applicant fails to take any section of the examination for which the applicant is registered, and no deferral application and deferral fee are submitted prior to commencement of the examination, the applicant forfeits all fees previously paid.

Late applications may be accepted up to thirty (30) days prior to an examination date if submitted with a \$45 late fee in addition to the application fees. Applications and requests to defer due to extenuating circumstances received after the thirty (30) day deadline will be considered by the Board on a case-by-case basis.

## I. Refunds

Refunds of the examination fee will be made if requested prior to sixty (60) days before the examination. Refunds after that time will be made for emergency reasons only. The registration fee, however, will not be refunded.

## J. Scoring

A candidate may pass the examination in two ways: (1) if the overall score (the combined score for all seven (7) sections) is seventy-five percent (75%) or better, or (2) if each individual section is passed with a score of seventy percent (70%) or better (retakes allowed if four (4) or more sections passed at one sitting).

Time Limit: All seven (7) sections must be passed within seven (7) consecutive, regularly scheduled examination dates.

## K. Grading/Mailing Results

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

## L. Reference Materials

The Board has adopted and utilizes the following sources in determining the correct answers for the examination. The Board reserves the right to augment this list without prior notification.

### 1. Ability to Communicate Effectively

- (1) Bryan A. Garner, *The Redbook: A Manual On Legal Style*, current edition (5th), West Academic Publishing [ISBN 978-1-64242-143-9].

### 2. California Legal Procedure

- (1) *LPI Legal Professional's Handbook*, current edition, The Rutter Group, (800) 747-3161.
- (2) *LPI Law Office Procedures Manual*, current edition, The Rutter Group, (800) 747-3161.
- (3) Edward W. Jessen, *California Style Manual*, 4th ed. **[for citations only]**, West Group, (800) 328-4880 [ISBN 0-314-23370-9].

### 3. Reasoning and Ethics

- (1) Angela Schneeman, *Pocket Guide to Legal Ethics*, 1<sup>st</sup> ed., Delmar Cengage Learning [ISBN 10: 1-4180-5378-3] [ISBN 13: 978-1-4180-5378-9].
- (2) California Business & Professions Code, Div. 3 - Professions and Vocations Generally, Ch. 4 - Attorneys (Bus. & Prof. Code, § 6000 et seq.), also referred to as "The State Bar Act."  
<https://www.calbar.ca.gov/Attorneys/Conduct-Discipline/Rules/Selected-Legal-Authority/The-State-Bar-Act>

- (3) California Code of Civil Procedure, Part 4. Miscellaneous Provisions, Sections 1855-2094.  
<https://leginfo.legislature.ca.gov/faces/home.xhtml>
- (4) California Rules of Professional Conduct, Chapters 1 through 5  
<https://www.calbar.ca.gov/Attorneys/Conduct-Discipline/Rules/Rules-of-Professional-Conduct>
- (5) Alex Padilla, *Secretary of State, Notary Public Handbook*.  
<http://www.sos.ca.gov/notary/handbook/>

#### 4. **Law Office Administration**

- (1) Bryan A. Garner, *The Redbook: A Manual On Legal Style*, current edition (5th), West Academic Publishing [ISBN 978-1-64242-143-9].  
<https://faculty.westacademic.com/Book/Detail?id=335526>
- (2) *LPI Law Office Procedures Manual*, current edition, The Rutter Group, (800) 747-3161.
- (3) Angela Schneeman, *Pocket Guide to Legal Ethics*, 1st ed., Delmar Cengage Learning [ISBN 10: 1-4180-5378-3] [ISBN 13: 978-1-4180-5378-9].
- (4) Alex Padilla, *Secretary of State, Notary Public Handbook*.  
<http://www.sos.ca.gov/notary/handbook/>
- (5) James Bernstein, *Computers Made Easy: From Dummy To Geek*, 2nd Edition, Independently Published (2/3/2020) [ISBN-13: 979-8608506109].

#### 5. **Legal Computations**

- (1) *LPI Legal Professional's Handbook*, current edition, The Rutter Group, (800) 747-3161.
- (2) *LPI Law Office Procedures Manual*, current edition, The Rutter Group, (800) 747-3161.
- (3) California Rules of Court, Title Two.  
<http://www.courts.ca.gov/rules.htm>

#### 6. **Legal Terminology**

- (1) *LPI Legal Professional's Handbook*, current edition, The Rutter Group, (800) 747-3161.
- (2) *LPI Law Office Procedures Manual*, current edition, The Rutter Group, (800) 747-3161.

- (3) Edward W. Jessen, *California Style Manual*, 4th ed., West Group, (800) 328-4880 [ISBN 0-314-2330-9]
- (4) A legal dictionary such as *Black's* or *Barron's Law Dictionary* by Gifis.

7. **Skills**

- (1) *LPI Legal Professional's Handbook*, current edition, The Rutter Group, (800) 747-3161.
- (2) *LPI Law Office Procedures Manual*, current edition, The Rutter Group, (800) 747-3161.
- (3) Edward W. Jessen, *California Style Manual*, 4th ed., West Group, (800) 328-4880 [ISBN 0-314-2330-9]

8. **All Sections Utilize the Following:**

- (1) CCLS Study Kit, Legal Professionals Incorporated, (800) 281-2188. [www.legalprofessionalsinc.org](http://www.legalprofessionalsinc.org)
- (2) California Rules of Court. <http://www.courts.ca.gov/rules.htm>
- (3) Judicial Council forms. <http://www.courts.ca.gov/forms.htm>
- (4) A legal dictionary such as *Black's* or *Barron's Law Dictionary* by Gifis (for assistance with terms found in the LOPM and LPH).

**M. CCLS Recertification**

Once you have become a California Certified Legal Secretary, you must complete 15 hours of continuing legal education within a three-year period in order to maintain your certification. Every three years, you must submit proof of attendance of at least fifteen hours of continuing education to the CCLS® Certifying Board with the Application for Recertification and a fee. For additional information regarding CCLS Recertification, please visit the LPI website: <https://www.legalprofessionalsinc.org/ccls-recertification/> and review the Standards for Recertification.

## SAMPLE TEST QUESTIONS

### Ability to Communicate Effectively

**Directions:** From the following sentence pairs, select the one with correct punctuation. Assume that all other elements of the sentence are correct and cannot be changed.

1. [A] My Boss said, "We're closing early on New Year's Eve."  
[B] How many times has he said "I will handle"?

**Directions:** Look at the following divided words or phrases. Select the word or phrase that has been correctly divided

2. [A] Recrea-tion  
[B] Recre-ation

**Directions:** Review the following sentences. Some may contain errors in punctuation, grammar, and capitalization. Select the most correct answer.

3. [A] Mr. and Mrs. Morris' plane tickets were held at the airline's customer service counter.  
[B] Mr. and Mrs. Morris' plane tickets was held at the airline's customer service counter.

### California Legal Procedures

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

1. When a summons and complaint is accomplished by mail service on a person outside California, the responding party has \_\_\_ days from the date of mailing to respond to the summons and complaint.

- [A] 10
- [B] 20
- [C] 30
- [D] 40



**Directions:** Read each statement carefully and decide whether it is true or false.

2. The procedures for obtaining discovery in family law matters are the same as in general civil procedures.

- [A] True
- [B] False

### **Reasoning and Ethics**

**Directions:** Read each statement carefully and decide whether it is true or false.

1. The duty of confidentiality continues after the client/lawyer relationship has terminated and even after the client's death.

- [A] True
- [B] False

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

2. The opposing side in a transaction sends your office the stock certificates your client purchased in the deal. You open the package containing the certificates. What duties does your law office have?

- [A] Notify the client to pay any charges associated with the stock certificates.
- [B] Send the certificates to the client.
- [C] Identify and label the securities upon receipt, and place them in a safe deposit box or other place for safekeeping as soon as possible.
- [D] Maintain the records for a year.

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

3. In order to provide some protection to the public, California law requires every notary public to file an official bond in the amount of:

- [A] \$10,000
- [B] \$15,000
- [C] \$20,000

**Directions:** Read each situation carefully and select the option that is most correct.

4. You often tell your husband about the estates with which you are involved at work. You believe that so long as you don't tell your husband the names (you refer to the cases as "Mr. A's estate" or "Ms. B's will") you have not divulged any secrets. Which option describes your action?

- [A] A legal secretary would show initiative and good judgment doing this.
- [B] It would be inappropriate for legal secretary to do this.
- [C] It would be unethical for a legal secretary to do this.

### **Law Office Administration**

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

1. The margins of each page filed with the Superior Courts must be a minimum of \_\_\_\_ from the left margin and \_\_\_\_ from the right margin.

- [A] 1 inch and 1 inch
- [B] 1 inch and 1.5 inches
- [C] 1 inch and .5 inch
- [D] .5 inch and .5 inch

2. Always try to fit an email address on one line. If it becomes necessary to divide an email address at the end of a line, you can:

- [A] Insert a hyphen within an email address to signify an end-of-line break
- [B] You may break before the *at* symbol [ @ ] or before a dot ( . )
- [C] You may break after a dot ( . )
- [D] You may break after a hyphen ( - )

**Directions:** Read each statement carefully and decide whether it is true or false.

3. When filing, a single letter comes before a name that begins with the same letter.

- [A] True
- [B] False

## **Legal Computations**

**Directions:** Read each question carefully and choose the answer which is most correct.

1. In probate matters, the original will and any codicils are lodged with the court with \_\_\_\_\_ days after having knowledge of death of testator?

- [A] 10
- [B] 20
- [C] 30
- [D] 60

2. A settlement has been reached in which four defendants will share the burden of paying the award. Plaintiff was awarded \$480,000. Defendant A is responsible for 40 percent of the total award. Defendant B, a subsidiary of Defendant A, has been assigned 5 percent of Defendant A's burden. Defendant C will pay 55 percent of the total, while Defendant D will pay the remaining 5 percent of the total award.

Defendant B will pay:

- [A] \$19,200
- [B] \$192,000
- [C] \$9,600
- [D] \$96,000

3. Defendant A will pay:

- [A] \$192,000
- [B] \$182,400
- [C] \$216,000
- [D] \$168,000

4. As part of the above award, payments were to be made within 30 days. Late payments would accrue interest at the rate of 12% per year. Defendant C did not pay their portion of the award for 90 days. What is the total amount that Defendant C will have to pay, including principal and interest? Note: the court requires interest to be calculated using 360 days in a year.

- [A] \$266,640
- [B] \$264,000
- [C] \$295,680
- [D] \$269,280

## **Legal Terminology**

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

1. Abbreviation for “Maine” in citations.

- [A] Ma.
- [B] Me.
- [C] ME
- [D] None of the above.

2. To compensate or reimburse a person who has suffered a loss is to \_\_\_\_\_.

- [A] infringe
- [B] inflict
- [C] indemnify
- [D] indict

**Directions:** Read each statement carefully and decide whether it is true or false.

3. A demurrer is a formal objection to a pleading.

- [A] True
- [B] False

## **Skills**

**Directions:** You will be given a package including a memo, case profile and Judicial Council forms, in different fields of law. The memos will provide specific instructions to the legal secretary from the attorney. You will be directed to answer questions about the documents according to the memo.

## ANSWER KEY

### Ability to Communicate:

1. A
2. B
3. A

### California Legal Procedure:

1. D
2. A

### Reasoning and Ethics

1. A
2. C
3. B
4. C

### Law Office Administration:

1. C
2. A
3. A

### Legal Computations:

1. C
2. C
3. B
4. D

### Legal Terminology:

1. B
2. C
3. A