



*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, 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 Centers**

One site will be established in the northern portion of the state and one in the southern portion of the state. Testing centers will generally be established in the general geographic areas commonly known as Greater Los Angeles and the San Francisco Bay Area. Specific test sites for each examination will be determined by (1) the most centrally located available site to the registered test applicants; (2) the number of test applicants requesting a specific site; (3) the availability and cost of appropriate testing facilities; and (4) the availability of appropriate proctors. Whenever possible and practical, test site selection preference will be given to law offices and other sites provided at no cost to the Certifying Board.

## 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 the 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:

Make checks payable to "LPI"	LPI MEMBERS	NON-LPI MEMBERS
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, if space is available. 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 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 its right to augment this list without prior notification.

### **1. Ability to Communicate Effectively**

- (1) William A. Sabin, *The Gregg Reference Manual*, Tribute Edition, 11<sup>th</sup> ed., McGraw-Hill [ISBN 0-07-339710-5].

### **2. California Legal Procedure**

- (1) *LSI Legal Professional's Handbook*, current edition, The Rutter Group, (800) 747-3161.
- (2) *LSI 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 0-314-2330-9].

### 3. **Reasoning and Ethics**

- (1) Angela Schneeman, *Pocket Guide to Legal Ethics*, 1<sup>st</sup> ed., Cengage Learning [ISBN 1-4180-5378-3].
- (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."  
<http://rules.calbar.ca.gov/SelectedLegalAuthority/TheStateBarAct.aspx>
- (3) California Code of Civil Procedure, Part 4. Miscellaneous Provisions, Sections 1855-2094.  
<http://leginfo.legislature.ca.gov/faces/codesTOCSelected.xhtml?tocCode=CCP&tocTitle=+Code+of+Civil+Procedure+-+CCP>
- (4) California Rules of Professional Conduct, Chapters 1 through 5  
<http://rules.calbar.ca.gov/Rules/RulesofProfessionalConduct.aspx>
- (5) Alex Padilla, *Secretary of State, Notary Public Handbook*.  
<http://www.sos.ca.gov/notary/handbook/>

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

- (1) 1. William A. Sabin, *The Gregg Reference Manual*, Tribute Edition, 11<sup>th</sup> ed., McGraw-Hill [ISBN 0-07-339710-5]; Appendices C and D online at <http://www.mhhe.com/business/buscom/gregg/>
- (2) Mark L. Chambers, *PCs All-In-One Desk Reference for Dummies*, most current edition (Parts 1 through 3)
- (3) *LSI Law Office Procedures Manual*, current edition, The Rutter Group, (800) 747-3161.
- (4) Angela Schneeman, *Pocket Guide to Legal Ethics*, 1<sup>st</sup> ed., Cengage Learning [ISBN 1-4180-5378-3]
- (5) Alex Padilla, *Secretary of State, Notary Public Handbook*.  
<http://www.sos.ca.gov/notary/handbook/>

### 5. **Legal Computations**

- (1) *LSI Legal Professional's Handbook*, current edition, The Rutter Group, (800) 747-3161.

(2) *LSI 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) *LSI Legal Professional's Handbook*, current edition, The Rutter Group, (800) 747-3161.

(2) *LSI 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) *LSI Legal Professional's Handbook*, current edition, The Rutter Group, (800) 747-3161.

(2) *LSI 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).

## 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. Darken the bubble corresponding to the letter on your answer sheet.

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. Mark the letter of the word or phrase that has been correctly divided. A (/) indicates the division of a phrase. A (-) indicates the division of a word.

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

**Directions:** Review the following sentences. Some may contain errors in punctuation, grammar, and capitalization. If the sentence is correct, darken the "A" bubble on your answer sheet; if the sentence is incorrect, darken the "B" bubble on your answer sheet.

3. Mr. and Mrs. Morris' plane tickets were held at the airline's customer service counter.

**Directions:** Review each of the following sentences for spelling. If all the words in the sentence are spelled correctly, darken the "A" bubble. If any word is misspelled, darken the "B" bubble.

4. Every attorney has their own idiosyncrasy when it comes to questioning witnesses.

**Directions:** From the following pairs of words, choose which word is spelled correctly.

5. [A] sargeant  
[B] sergeant

**Directions:** Review the following word groups for correct spelling. If all the words in the group are spelled correctly, darken the “A” bubble. If any word is misspelled, darken the “B” bubble.

6.            Affect                      Bi-weekly                      All right                      Ain't

**Directions:** Review the following sentences. Select the correct word by darkening the letter of the correct word on the answer sheet.

7.    [A] Who [B] Whom shall I say is calling?

**Directions:** Review the following sentences. Select the correct word form by darkening the corresponding letter on the answer sheet.

8.    The attorney asked for [A] up to date [B] up-to-date medical records, including billing information.

**Directions:** Review the following sentences for correct number usage. If the sentence is correct as written, darken the “A” bubble. If the sentence is incorrect, darken the “B” bubble.

9.    Last year we collected \$32,567,500 in revenues; so far this year, we have collected \$20 million.

### **California Legal Procedures**

**Directions:** Read each question carefully and select the answer that is the most correct. Using the pencil and the answer sheet provided, completely darken the bubble corresponding to your answer.

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. On the answer sheet provided, darken the bubble **A** if it is TRUE and **B** if it is 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. On the answer sheet provided, darken the bubble **A** if it is TRUE and **B** if it is 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. Using the No. 2 pencil and the answer sheet provided, completely darken the bubble corresponding to your answer.

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. Using the No. 2 pencil and the answer sheet provided, completely darken the bubble corresponding to your answer.

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. Using the No. 2 pencil and the answer sheet provided, completely darken the bubble corresponding to your answer.

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. Using the pencil and the answer sheet provided, completely darken the bubble corresponding to your answer.

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. On the answer sheet provided, darken the bubble **A** if it is TRUE and **B** if it is 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. Darken the bubble corresponding to the letter on your answer sheet.

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. Using the No. 2 pencil and the answer sheet provided, completely darken the bubble of your answer.

1. Maine

- [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. On the answer sheet provided, darken the bubble **A** if it is TRUE and **B** if it is FALSE.

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

- [A] True
- [B] False

**Directions:** Read across the columns. Answers are identified at the top of each column with the letters “**A**” through “**C**.” Locate the correct abbreviation in each line.

4.		A	B	C
	Government Code	(Gov. Code)	(G.C.)	(Gov’t. C.)

### **Skills**

**Directions:** You will be given a package including a memo, case profile and Judicial Council forms, in different fields of the law practice. The memos will provide specific instructions to the legal secretary from the attorney. You will be directed to prepare documents for the attorney according to the memo. In reality, there will be three options of the various documents and you will be asked to select the one-most correct version of each page. Proofreading is an important element of this section.

## ANSWERS TO SAMPLE TEST QUESTIONS

### ***Ability to Communicate Effectively***

No.	Answer	Authority
1.	A	<i>The Gregg Reference Manual</i> , Tribute Ed., Section 2, 227
2.	B	<i>The Gregg Reference Manual</i> , Tribute Ed., Section 9, 914
3.	B	<i>The Gregg Reference Manual</i> , Tribute Ed., Section 6, 631a
4.	A	<i>The Gregg Reference Manual</i> , Tribute Ed., Section 7, 720
5.	B	<i>The Gregg Reference Manual</i> , Tribute Ed., Section 7, 720
6.	B	<i>The Gregg Reference Manual</i> , Tribute Ed., Section 11
7.	A	<i>The Gregg Reference Manual</i> , Tribute Ed., Section 10, 1061c
8.	B	<i>The Gregg Reference Manual</i> , Tribute Ed., Section 8, 831
9.	B	<i>The Gregg Reference Manual</i> , Tribute Ed., Section 4, 403b

### ***California Legal Procedures***

No.	Answer	Authority
1.	D	<i>LSI Law Office Procedures Manual</i> , Ch. B, Sec. V (A)(5), (B-28); Code Civ. Proc. §415.40
2.	A	<i>LSI Law Office Procedures Manual</i> , Ch. H, Sec. II, (E)(2), (H-18)

### ***Reasoning & Ethics***

No.	Answer	Authority
1.	A	<i>Pocket Guide to Legal Ethics</i> , Ch. 5
2.	C	California Rules of Professional Conduct, Rule 4-100
3.	B	<i>Secretary of State, Notary Public Handbook</i>
4.	C	California Rules of Professional Conduct, Rule 3-100

### ***Law Office Administration***

No.	Answer	Authority
1.	C	<i>LSI Law Office Procedures Manual</i> , N-11; California Rules of Court, rule 2.107
2.	B	<i>The Gregg Reference Manual</i> , Tribute Ed., Section 15, 1510
3.	A	<a href="http://www.gregg.com">www.gregg.com</a> <i>The Gregg Reference Manual</i> , Appendix C (available online only)

<b>Legal Computations</b>		
No.	Answer	Authority/Explanation
1.	C	<i>LSI Legal Professionals Handbook</i> , p. 17-20.
2.	C	Defendant A Burden = \$192,000 (40% of total) Defendant B Burden = <u>\$9,600</u> (5% of Defendant A Burden)
3.	B	\$192,000 - \$9,600 = <u>\$182,400</u>
4.	D	Defendant C portion of award = \$264,000 \$264,000 x 12% = \$31,680 per year \$31,680 / 360 = \$88 per day \$88 x 60 = \$5,280 \$264,000 + \$5,280 = <u>\$269,280</u>
<b>Legal Terminology</b>		
No.	Answer	Authority
1.	B	<i>California Style Manual</i> , 4 <sup>th</sup> ed., Table of Abbreviations
2.	C	<i>LSI Law Office Procedures Manual</i> , Glossary
3.	A	<i>LSI Legal Professional's Handbook</i> , Ch. 4
4.	A	<i>California Style Manual</i> , 4 <sup>th</sup> ed., Table of Abbreviations