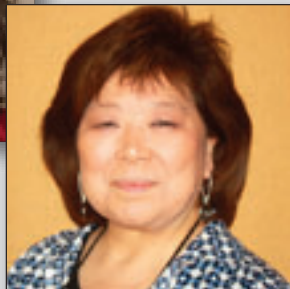


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ELISE DRESSER, CCLS has been a member of the CCLS Certifying Board since 2010. She was the CCLS Certifying Board Chairman from 2014-2015 and is now serving a six-month term as CCLS Certifying Board Chairman.

# RECERTIFICATION: Frequently Asked Questions

BY APRIL IGNAITIS, CCLS AND ELISE DRESSER, CCLS OF THE CCLS CERTIFYING BOARD

Congratulations to all the examinees who studied for and passed the California Certified Legal Secretary (CCLS) exam this year! If you are a new CCLS, or if you simply need a refresher course about recertification, here are some of the most frequently asked questions about recertifying. If your question is not answered below or you need further information on any subject, refer to the Standards for Recertification, which can be found on LSI's website, or contact the CCLS Certifying Board at [cclscertifyingboard@gmail.com](mailto:cclscertifyingboard@gmail.com).

## **WHEN DO I HAVE TO RENEW?**

Your Certification term is for a three-year period which expires on the date indicated on your notice of certification or recertification letter. If you are unsure when your term expires, please contact the CCLS Certifying Board Recertification Chair at [cclsrecertification@gmail.com](mailto:cclsrecertification@gmail.com) for clarification.

## **HOW MANY CREDIT HOURS DO I NEED?**

You must complete 15 credit hours of approved continuing education during each recertification term. It is your responsibility to complete a Certificate of Attendance and submit it to the sponsor of the educational program for signature verifying your attendance at the program. Please keep in mind that you cannot sign your own Certificates of Attendance. For specific information on who is to sign your Certificates of Attendance, please refer to the Standards for Recertification. Also, credit hours in excess of 15 hours per certification term shall not be applied to a subsequent certification term.

For each hour of instruction received at an educational program approved by the CCLS Certifying Board, you will receive 1 credit hour. Educational courses more than 1 hour in duration shall qualify for matching credit hours. Pursuant to the Standards for Recertification, of the required 15 credit hours, no more than 6 credit hours will be allowed for education regarding administrative and/or

mechanical function as performed by legal support staff, and of those 6 hours, no more than 2 credit hours will be allowed for educational courses where the topics are not unique to work done by legal support staff. Approved programs must focus on the duties of legal support staff in order to receive credit. For specific information concerning qualifying credit hours, please refer to the Standards for Recertification.

## **WHAT TYPES OF PROGRAMS ARE ACCEPTABLE FOR CCLS CREDIT?**

Approved providers are those providers which sponsor educational programs that may qualify for recertification credit. Not all educational programs sponsored by a particular approved provider will qualify for recertification credit, so if you have a question regarding a particular program, refer to the Standards for Recertification or contact the Certifying Board Chair or Recertification Chair for clarification. Approved provider status has been granted for the following educational programs:

Seminars and workshops (including online seminars, workshops, or study group sessions) sponsored by LSI, its affiliated associations, and its Legal Specialization Sections.

Seminars and workshops sponsored by The State Bar of California, its legal specialization sections, and any bar association in California.

## RECERTIFICATION...

Course and educational programs granted MCLE status by The State Bar of California.

Courses and educational programs approved for Professional Legal Secretary (PLS) continuing education credit by NALS.

Other educational programs offered by organizations to which approved provider status has been granted by the CCLS Certifying Board.

### **DO WEBINARS AND ONLINE STUDY GROUPS QUALIFY FOR CCLS CREDIT?**

Now that LSI (and other approved providers) have been offering more and more online webinars and online programs, such as Legal Secretarial Training and CCLS study groups, certification credit may be obtained through self-study by listening to or watching videotaped legal education courses approved by The State Bar of California for MCLE credit, including those sponsored by LSI and/or its affiliated member associations. Such credit hours shall not exceed 5 credit hours in any recertification period. A CCLS Certificate of Completion is required and is to be co-signed by the provider or your supervising attorney. (In the alternative, applicants may have their supervising attorney sign a CCLS Certificate of Attendance and attach it to the CCLS Certificate of Completion or MCLE Certificate.) If the provider does not offer a Certificate of Attendance, you may download the form from LSI's website.

CCLS recertification credit may be obtained by participating in a CCLS study group sponsored by LSI and/or its affiliated member associations. Credit hours for such study groups shall not exceed 10 credit hours (exclusive of independent study time) in any recertification period. Live participation shall be confirmed by the instructor. A certificate of participation completed by the study group instructor must be provided in order to claim credit hours.

CCLS recertification credit may be obtained by attending or participating in a webinar approved by The State Bar of California for MCLE credit, or any online workshop or seminar sponsored by LSI and/or its affiliated member associations. A CCLS Certificate of Completion is required to receive credit hours and is to be co-signed by the provider or your supervising attorney. (In the alternative, applicants may have their supervising attorney sign a CCLS Certificate of Attendance and attach it to the CCLS Certificate of Completion or MCLE Certificate.) Certain LSI-sponsored online workshops, seminars, and study groups may or may not qualify for MCLE credit and, if necessary, will be considered by the CCLS Certifying Board on a case-by-case basis.

### **DO I NEED TO KEEP THE PROGRAM HANDOUTS?**

Yes. Pursuant to the Standards for Recertification, in order to qualify for recertification credit, any program, course of study, or class of more than one hour must have a substantive handout. The Recertification chair will most likely not request a copy of the handout if the program is at least one hour in duration and the title of the program is clear as to the subject matter. However, if the title of the program is questionable and is over several hours in duration, you may be asked to provide a copy of the handout.

### **I HAVE MY 15 CREDIT HOURS. HOW DO I RENEW MY CERTIFICATION?**

Now that you have your 15 credit hours, you may submit your Application for Recertification on or before the date your certification term expires, in two ways:

**Option 1:** Submit your Application for Recertification and copies of your Certificates of Attendance and the requisite \$25 recertification fee\* to the CCLS Certifying Board Recertification Chair, whose address can be found on the Application for Recertification, by U.S. regular mail.

**Option 2:** Submit your Application for Recertification and copies of your Certificates of Attendance electronically via PDF to the CCLS Certifying Board Recertification Chair at [cclsrecertification@gmail.com](mailto:cclsrecertification@gmail.com) along with the requisite \$25 recertification fee.\*

**\*IMPORTANT:** If paying by check, please make it payable to "LSI." If paying by PayPal, the CCLS Certifying Board will send you a PayPal link.

Credit hours in excess of 15 hours per certification term shall not be applied to a subsequent certification term.

### **DO I NEED TO ADVISE THE CERTIFYING BOARD IF I MOVE, LEAVE THE LEGAL FIELD, OR RETIRE?**

Yes! If your address changes, be it your email address, work address, or residence address, you need to notify the CCLS Certifying Board. While it is your responsibility to recertify before your recertification term expires, the Recertification Chair will send out courtesy reminders approximately 60 days before the Application for Recertification is due. If your contact information has changed during the preceding three years, the CCLS Certifying Board may not be able to find you!

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## **HISTORY, HER STORY...**

returned files may have contained copies of charters, but my current files do not. Then, there was that skinny green folder with a roster of all the local associations that have ever existed and the clue on a yellow post-it note indicating the charters were kept at corporate office.

A search has ensued through the storage container at corporate office. With the help of LSI Administrator Kim Oreno and LSI Secretary Lynne Prescott, CCLS, I am making my way through boxes of files looking for those elusive charters. If I ever find them, you can be sure I will scan them and include those digital records in the Parliamentary files I pass on.

What other documents should your association have and how long should you keep them? These are other questions I have been asked during my parliamentary term. Bylaws and Standing Rules are a must and it's great if they show dates of amendment. Minutes of meetings should be retained permanently. Treasurer's reports should be kept for at least 7 years. Governor's reports from conferences and bulletins or newsletters could be great resources for

local history. Lists of past presidents, life and honorary members are important. Mt. Diablo LPA includes this list as a prelude to their standing rules – nice! Each association should determine a retention policy including which records to keep, a method of storage, and a schedule of destruction.

One of the associations mentioned above ultimately found their charter in an old history book. Hurray! I located a copy of the charter provided to Long Beach LSA, our oldest association, and attach it here for its historical significance. Do you know where your association's charter is? When Marin County LPA celebrated its 50th anniversary, we could not find our original charter and LSI graciously issued us a duplicate. It's nice, but not quite the same as having the original document. I can certainly issue a duplicate if your association cannot locate its charter.

**LS**

## **RECERTIFICATION...**

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If you move out of state, notify the CCLS Certifying Board so that a hold can be placed on your continuing education requirements. You cannot use the CCLS designation while you are out of state and not maintaining your educational requirements. If you return to California, you must notify the CCLS Certifying Board within 60 days of your return and then continue with your continuing education requirements.

If you leave the legal field, contact the CCLS Certifying Board so that your status can be changed to inactive and a hold put on your continuing education requirements. You will not be able to use your CCLS designation during this time. If you return to the legal field, you must notify the CCLS Certifying Board immediately and continue on with your educational requirements.

If you have retired from the legal profession, you must notify the CCLS Certifying Board. Upon retirement, you no longer need to obtain continuing educational credit, however, you may still continue to use the CCLS designation. If you return to work in the legal field and wish to reactivate your CCLS status, you must notify the

CCLS Certifying Board and continue with your educational requirements.

### **FINAL CHECKLIST**

You're almost there! Your recertification packet should include: (1) Completed Application for Recertification (with current contact information); (2) check payable to "LSI" in the amount of \$25/or check off the box that you are requesting to pay via PayPal on the Application for Recertification; (3) copies of your signed Certificates of Attendance; and (4) a copy of any program handout, if applicable or requested, for any program over an hour in duration. You will receive confirmation of your recertification from the Recertification Chair.

If you follow these procedures, processing your recertification will go much smoother and you will be recertified for another three years. Again, if you have additional questions, please contact the CCLS Certifying Board or refer to the Standards for Recertification at [www.lsi.org](http://www.lsi.org) for updates.

**LS**