

Volume 8 / Issue 3 / Fall 2015

Viva Las  
CALSP<sub>ro</sub>

47<sup>th</sup> Conference

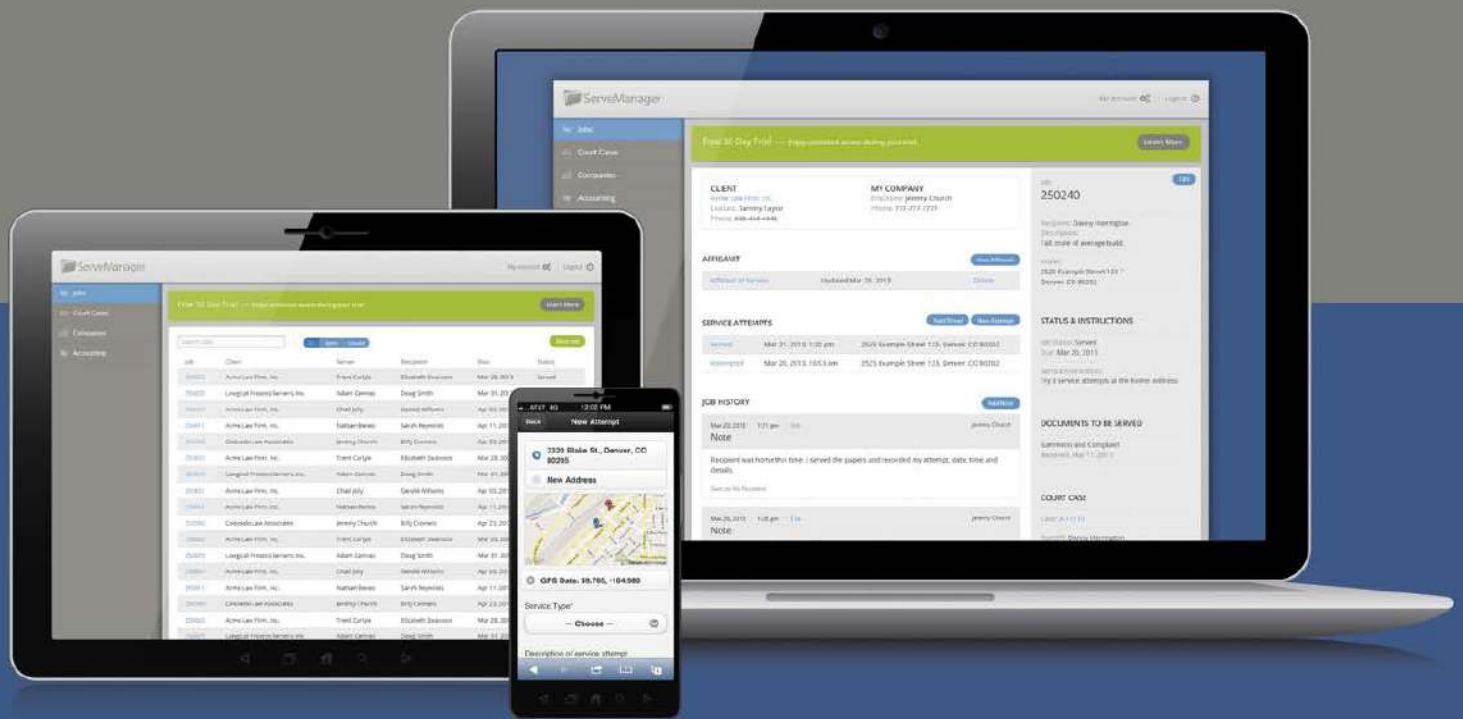
Monte Carlo Resort & Casino  
Las Vegas, Nevada  
— October 16-18, 2015 —



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## eDelivery of your CALSPro Press

The CALSPro Newsletter is now available in electronic format only! Make sure we have your current e-mail address, so you don't miss an issue: [stephanie@caladmanagement.com](mailto:stephanie@caladmanagement.com)

CALSPro is not responsible for the accuracy of any comments herein relating to their own case or actual law. All readers should do research as to the actual legality of any issue. Opinions, viewpoints, or articles published under a byline and appearing in this newsletter do not necessarily reflect the official position of this association. Acceptance of advertisements in no way constitutes professional approval or endorsement by CALSPro. No anonymous Letters to the Editor will be printed. Your name will be withheld upon request.

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 E-mail: [info@calspro.org](mailto:info@calspro.org)



FIND US ON  
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# PRESIDENT'S MESSAGE

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CLIFF JACOBS

2015 CALSPRO PRESIDENT

**T**he landscape of our profession is shifting at a faster rate now than ever before largely due to the effects of technology, and the trends of law firms that boast a younger pool of associates and partners fully submersed in the electronic paradigm. The world is at their fingertips, and traditional practices seem odd and strangely out of place to many when an interface, app and social media can provide a desired, swift and less costly result.

Ensuring due process of law will continue to be a paramount responsibility of our profession. How we evolve within the context of technological advancements will shape our relevance. In this vein we must all be diligent in assessing where we as a profession can be the bastions of due process and fair and equal access to justice and the courts. As an integral part of the conversation, being disinterested third parties we remain relevant. The key is how to incorporate that and be included not only in the conversation, but also in the actual workflow. If you are just getting involved in this conversation now, learn all that you can and get more involved. Engage fully in what is happening, not because it may impact you, but because it will impact us all. We often hear the catch phrase "evolve so that you can remain relevant". The key here is to garner a solid

working knowledge of what is occurring and unfolding around us as a portion of what we currently do physically transitions to an eServices format statewide and ultimately Nationwide; and to develop a business strategy that will embrace the new model as it develops. We all have valuable knowledge and experience, which must be drawn upon at this time as a foundational basis for growth into the quickly expanding electronic arena. Change is inevitable and keeping pace with that change is a necessity to remain vital. I see many companies within our association taking a very strong active interest. True, many are larger companies, but I also see smaller and medium sized companies starting to really engage in the conversation. Las Vegas is a great location for conference this year because from there, we can get a good look at California as a whole from outside. I believe that it is not too late to engage, regardless of your size, and urge all CALSPRO members to be "all in" from this point forward as if it matters...because IT DOES. Now is the time to step up, take notice, get involved and play big. Join the conversation, engage and actually be a part of the future of process serving. We all need to do this to make a difference.

Last year at conference there were two particular platform items that I took a

strong stand on. First was to fully support CALSPRO's position to ensure the due process rights of all parties and witnesses in a legal action, as well as ensuring fair and equal access to our courts. The second was to make a bigger difference for our members, and show how much we value them. During this past year we have kept a watchful eye on how the courts accommodate the public, including members of the legal support profession.

We also continue to monitor legislation that may possibly impact our profession, and take measures to address and nullify any potentially harmful legislation just as we have done since 1969 when a group of likeminded people defeated a "mailing" bill which would have eliminated the need for process servers. This group seeing the importance of monitoring legislation then formed our association in 1970. CALSPRO is still stalwart in protecting preserving and promoting our profession, and our strength is amplified more so when our members get involved and engage with us. That was the basis for addressing the value of membership, and the impetus behind our renewed vigor in providing a better experience and bringing additional value to your membership.

*Continued on page 24*



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# CAPITOL REPORT

MICHAEL D. BELOTE, ESQ.  
CALIFORNIA ADVOCATES, INC.

## THE GOVERNOR, AWASH IN BILLS

**E**ver think it would be fun to be Governor of California? Whether “fun” is the right word for running a state of almost 40 million people is debatable, but it cannot be the right word for describing the 30 day period following the fall legislative adjournment each year. Under the state constitution, the Governor has 30 days to sign or veto the many hundreds of bills sent to him during the final days of session. This year approximately 600 bills were delivered in the days leading up to and following adjournment on September 11, meaning all must be acted upon by October 11. Meanwhile there are droughts and wildfires and all manner of other issues to be handled!

People may be surprised to learn that the Governor receives an individualized presentation from his staff on each and every bill sent to his desk. The Legislative Secretary and her staff deputies are expected to know the tiniest details of each bill, because the Governor possesses a very quick and curious mind, and they never know what questions he might ask. And with so many bills in so few days, a big challenge is just getting on the Governor’s calendar enough to deal with each bill.

2015 represents the first year of the 2015-2016 two-year legislative session. Some bills not passed this year can carry over to 2016 as “two-year bills”. For this year, approximately two-dozen bills were

introduced of interest to CALSPRO. The bills cover a variety of subjects, including the following:

- AB 322 (Waldron): Social Security Numbers. Prohibits any collection or storage of Social Security numbers unless those numbers are encrypted. Two-year bill.
- AB 432 (Chang): Electronic Signatures. Amends the Code of Civil Procedure to include a definition of electronic signatures and provides that an electronic signature by a judicial officer has the same force and effect as an original signature. Signed by Governor-Chapter 32, Statutes of 2015.
- AB 844 (Bloom): Search Warrants-Service of Process. Provides that a foreign corporation or foreign limited liability company may consent to service of process of search warrants through email or submission to a designated Internet Web portal. Signed by Governor-Chapter 57, Statutes of 2015.
- AB 879 (Burke): Juvenile Court Proceedings. Allows probation officers, social workers and courts to provide notice of juvenile dependency proceedings by email in certain circumstances. Signed by Governor-Chapter 215, Statutes of 2015.

- AB 1197 (Bonilla): Deposition Notices. Requires deposition notices to include an disclosure in cases where the person noticing the deposition has been directed to use a certain court reporting entity because of a contractual relationship between the court reporting entity and the person or entity paying for the deposition. On Governor’s Desk.
- AB 1267 (Bloom): Liens and Encumbrances. Expands current law prohibiting the filing of false liens and encumbrances against public safety officials to any person. Signed by Governor-Chapter 208, Statutes of 2015.
- AB 1335 (Atkins): Recording Surcharges. Imposes a \$75 surcharge on recording certain real estate documents in order to fund the development of affordable housing. Two-year bill.
- AB 1337 (Linder): Medical Records. Creates in statute a standardized authorization form for the release of medical records, to replace the multiplicity of authorization forms apparently in use today. On Governor’s Desk.

*Continued on page 28*





**By Stephanie Sayler, Conference Chairperson**

**W**e will be welcoming you to Las Vegas this October with an educational and action-packed schedule. Not only will you learn the most current industry information to stay an informed professional, you will also have the opportunity to learn the basics in self-defense! Stretch your mind and body and get ready for learning. Join the fun with our welcome reception at The Pub inside the Monte Carlo Resort & Casino after you enjoyed the Jack C. Janney Memorial Golf Tournament. Some of our educational highlights:

Tony Klein of the Process Server Institute will provide a comprehensive presentation for serving pre-judgment or post-judgment Writs of Attachment and Writs of Execution in California. He will specifically describe deposit account and real property levies and wage garnishment procedures. He is the author of several books on process serving, including The Registered

Process Server's Guide to Service of Process in California. Mack Jackson, Jr., of MJ Computer Concepts, Inc. will cover identity theft, security issues and other challenges facing us while we perform our legal support services. He is a graduate of Thomas Jefferson School of Law in San Diego with a Masters degree in Law (J.S.M). Mr. Jackson is certified in anti-money laundering consulting, risk management, international cyber crime security and helps individuals and companies protect themselves from identity theft and fraud.

Our educational round tables on Sunday morning will include more on process serving, self-defense, social media marketing and self-improvement information to keep you focused and successful. You also can learn a great deal of information from our exhibitors who attend conference to inform you in all the ways they can keep your business running smoothly and profitably. Please visit the

exhibitors so they can assist you in keeping up with technology and other services and products. You will also receive the latest updates on eFiling/eService from our panel on Saturday afternoon.

Las Vegas is a great venue for the entire family and we will be creating some of our own fun. Please create a team of 2 to 4 people and participate in our photo Scavenger Hunt. During Conference you participate in this game by uploading your photos to Instagram. We encourage you to submit your participation form prior to Conference, but you can also enter at check-in. The form, rules and information will be in the Conference program brochure that will be emailed to you. And do not worry if you're not an avid Instagram user, as we have people on staff that can easily show you the basics and how to use our event hashtag: #CALSPRO2015

See you in Vegas!



### **Monte Carlo Resort & Casino**

3770 Las Vegas Blvd. South, Las Vegas, NV 89109  
702.730.7777 • [www.montecarlo.com](http://www.montecarlo.com)

**Room Rate:** \$80.00 for Thursday; \$135.00 for Friday/Saturday + \$25.00 daily resort fee. Please contact the hotel directly 800.311.8999 and ask for the CALSPRO rate.

**Conference Details:** All registrations must be returned with payment by September 25, 2015 to avoid higher registration fees.

**Cancellation Policy:** No refunds will be allowed for cancellations received after September 25<sup>th</sup>.

### **California Association of Legal Support Professionals**

2520 Venture Oaks Way, Suite 150  
Sacramento, CA 95833  
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[www.calspro.org](http://www.calspro.org) • [info@calspro.org](mailto:info@calspro.org)





## Annual Business Meeting

The Annual Business Meeting will be held on Saturday, October 17 from 8:30 am – 10:30 am and from 2:15 pm – 3:15 pm. During these sessions, important topics will be discussed, including: a Legislative Update; Committee Reports; Nominations and Elections for the Officers and Board of Directors; and General Member Comments/Suggestions. The Annual Business Meeting is an important component of the conference and provides members with the opportunity to participate and get involved in industry and association activity.

### VOTING

Please be reminded that only current "Individual" Members are allowed to vote or hold elected office, no other category of membership has a right to vote or hold elected office.

If you are currently not an Individual Member, please be sure to take a minute to join right away. As a member of the association, it is important that you make your vote count and also consider running for the Board of Directors and be an active participant. Important – no person shall be eligible for election as an officer or to the Board of Directors unless he/she has been a member for one year or was admitted at the last Annual Conference.

An Individual Membership application is contained in this registration brochure – please complete it and send it in with your conference registration.

## 19<sup>TH</sup> ANNUAL CALSPRO JACK C. JANNEY MEMORIAL GOLF TOURNAMENT

**Friday, October 16, 2015**

**7:30 am Check-In**

**• 8:00 am Tee-Off**

### *Badlands Golf Club*

9119 Alta Drive

Las Vegas, NV 89145

702.363.0754

### **Transportation on own**

**\$125<sup>00</sup> per person;  
includes green fees, cart,  
and buffet lunch.**

*Registration cutoff October 1st.*

*Register Now.*




**Awards for  
1<sup>st</sup>, 2<sup>nd</sup> & 3<sup>rd</sup>  
place teams**



**PERUSE THE SILENT  
AUCTION ITEMS AND BE A  
LUCKY BIDDER!**

**Winners will be announced  
at the Saturday Night  
Banquet**



**INTERESTED IN BECOMING  
A CCPS  
(CALSPRO CERTIFIED  
PROCESS SERVER)?**

**... or just need to renew your  
certification or fine tune your serving  
skills?**

**Be sure to sign up for the exam on  
Saturday, October 17th .**

# Conference Schedule

Friday, October 16, 2015

**8:00 am**

**19th Annual CALSPro Jack C. Janney  
Memorial Golf Tournament – Silverstone  
Golf Club, Las Vegas, NV**

**4:00 pm – 5:30 pm**

**Board of Directors Meeting**

**5:30 pm – 7:30 pm**

**Registration Open/Exhibitor Set Up**

**6:30 pm – 8:30 pm Welcome event**

Join us at The Pub inside the Monte Carlo where we will be gathering **upstairs** to enjoy some food and spirits and kick-off the Conference! Live music starts at 9 pm and you're welcome to continue the celebration at The Pub, start your Scavenger Hunt activities or hit The Strip.

Saturday, October 17, 2015

**7:30 am – 5:00 pm**

**Registration and Exhibits Open**

**7:30 am – 8:30 am**

**Continental Breakfast in Exhibit Area**

**8:30 am – 10:30 am**

**Annual Business Meeting** – Call to Order and Roll Call, President's Report, Secretary-Treasurer's Report, and Legislative Update with *Mike Belote, Esq. California Advocates, Inc.* Nominations Open for the Board of Directors. This meeting will also include an Antitrust Presentation by Antitrust Officer, Mike Belote, which shall summarize CALSPro's obligations under the FTC Order and shall also address compliance with the Antitrust Laws.

**10:30 am – 11:00 am**

**Exhibitor Break and Exhibitor  
Presentations**

**11:00 am – 12:30 pm**

**1) CONTINUING EDUCATION SESSION:**

Tony Klein of the Process Server Institute will provide a comprehensive presentation for serving pre-judgment or post-judgment Writs of Attachment and Writs of Execution in California. He will specifically describe deposit account and real property levies, and wage garnishment procedures. Author of *The RPS's Guide to Service of Writs of Attachment and Writs of Execution*.

**12:30 pm – 1:30 pm**

**Networking Luncheon Buffet and Bert  
Rosenthal Memorial Award Presentation**

**1:30 pm – 2:30 pm**

**Keynote Speaker: Mack Jackson Jr.**

*Author and Technology Consultant*

Mack Jackson, Jr., Author and Technology Consultant covers identity theft, security issues and other challenges facing us while we perform our legal support services.

**2:30 pm – 2:45 pm Exhibitor Break**

**2:45 pm – 3:45 pm**

**Annual Business Meeting continued**

Nominations, Elections, and Committee Reports

**3:45 pm – 4:00 pm Exhibitor Break**

**4:00 pm – 5:00 pm**

**3) CONTINUING EDUCATION SESSION:**

eFiling/eService Panel - Technology Update of California Courts

**5:00 pm – 6:30 pm**

**CCPS Exam Review and Exam**

**5:00 pm – 6:30 pm**

**CALSPro HISTORY PROJECT**

This open time slot is available to members to share their story regarding their involvement with CALSPro, its members, and/or the industry. Each participant will be allowed up to five minutes of recording time. These recordings will be used to support the association's historical preservation project; your time and participation are greatly appreciated.

**5:00 pm – 6:30 pm**

Make an appointment to meet with vendors during this time for a more in depth review of their goods and services.

**6:30 pm – 7:30 pm**

**Cocktail Reception and Silent Auction**

**7:30 pm – 9:30 pm**

**Annual Awards and  
Installation Banquet and  
Silent Auction**

Continued on next page...



Sunday, October 18, 2015

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**7:30 am – 11:00 am**  
**Registration and Exhibits Open**

**7:30 am – 9:00 am**  
**Continental Breakfast**

**8:30 am**  
**Deadline to upload Scavenger Hunt**  
**photos to Instagram**

**9:00 am – 11:00 am**  
**Interactive Roundtable Sessions**  
Process Serving; Social Media Marketing; Goal Setting for Leaders; Self-Defense. The round table sessions will provide an opportunity for attendees to ask questions, share solutions and spark ideas.

**11:00 am**  
**CONFERENCE ADJOURNS -**  
**THANK YOU FOR ATTENDING**

## Speaker & Panel Information

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### Tony Klein

The Process Server Institute (PSI) is an educational organization in California, dedicated to the study and teaching of the art and business of process serving. PSI offers a series of entrepreneurial seminars throughout California that teach the fundamentals of process serving, the laws that govern service of process and completing proof of service. Tony Klein's seminars are taught from a process server's perspective and cover the technical aspects of the service statutes. CALSPRO is fortunate to have Mr. Klein as an educational presenter this year at our Conference to teach us more about the proper handling of *Writs of Attachment* and *Writs of Execution in California*. He is the author of several books on process serving, including *The Registered Process Server's Guide to Service of Process in California*.

### eFiling/ eService Panel



*Update on eFiling/eService in the California courts. Join this educational session to hear our panel discuss the most recent activities involving technology and our judicial branch.*



# Keynote Speaker



## **About Mack Jackson Jr.**

*Keynote Speaker, Author and Technology Consultant*

Mack Jackson Jr. is an expert on Internet security systems and compliance. He brings increased security awareness to his audiences and communicates the importance of security measures in protecting your business. Mack will show you how to improve your security plan, data breaches and avoid legal hassles. His passion and personality will energize and inspire you to protect your information and his ability to make complicated information clear and understandable. He will help you keep your personal information safe online.

Since 1984, Mack Jackson Jr. has been a technology consultant, author, business owner, software programmer and a project manager.

He has consulted with leading software manufacturers and Fortune 500 companies. Mack is the owner of MJ Computer Concepts Inc., a consulting firm that coaches businesses on Internet security and business management.

As a software programmer, Mack has designed business processes and procedures to protect company's sensitive information and accounting software consulting. Mack comprehends how computer systems can be breached and vulnerable to hackers and cybercriminals.

During the early 90's, Mack was a popular radio host on KLAV Las Vegas. His show, "Computers Technology," was a front-runner in forecasting computer innovations. His show helped inform consumers with issues regarding Y2K and privacy issues. Mack is an author and has contributed his writing in the "Life Choices" series on 'Financial Fitness'.

With the increase in cyber crimes of Identity Theft, Mack understands this issue and he has worked with the leading privacy companies and technology associations to protect your personal identifiable information from one of the fastest growing crimes of the 21st century.

Mack Jackson Jr. is a graduate of Thomas Jefferson School of Law in San Diego with a Masters degree in Law (J.S.M). Mack is certified in anti-money laundering consulting, risk management and international cyber crime security. Mack has consulted as a professional witness in civil cases regarding software system fraud and software contracts. Mack has developed a series of training programs to help individuals and companies protect themselves from identity theft and fraud.

"Knowledge is Power, we need to be aware of our rights and protect our privacy..."

—Mack Jackson Jr.

# Viva Las CALSP<sup>ro</sup> Scavenger Hunt

## Early Registration Form

CALSP<sup>ro</sup> is excited to announce a new event for the 2015 Annual Conference. This event is intended to be fun and exciting for all attendees and their guests. Registration for the event can be completed by returning this form to [scavengerhunt@calspro.org](mailto:scavengerhunt@calspro.org) or turning it in at Conference Check-In.

We will be using "Instagram," a smart phone App to assist with this game. Downloading the App prior to your arrival in Las Vegas will be essential to help you and your team hit the ground running.

Step by step instructions on downloading the App are listed below.

We will be using the hashtag **#CALSP<sup>ro</sup>2015** for all of our scavenger hunt entries.

### Rules

*Find sites based on clues and take digital photos*

- Team size: 2 to 4 people
- Photos must be taken during the conference (Friday 4pm - Sunday 8:30 am)
- All photos must have at least 2 team players in the photo.
- All photos must show your team's validation item and team number. Team numbers to be provided to you at Conference Check-In.
- Photos must be uploaded to Instagram with the hashtag **#CALSP<sup>ro</sup>2015** before 8:30 am on Sunday.
- No illegal activities. Each successful photo earns points—some worth more than others.
- 1st, 2nd & 3rd place prizes will be awarded.

### Sign Up

Team Leader: \_\_\_\_\_

Email: \_\_\_\_\_

Team Leader: \_\_\_\_\_

Email: \_\_\_\_\_

Team Leader: \_\_\_\_\_

Email: \_\_\_\_\_

Team Leader: \_\_\_\_\_

Email: \_\_\_\_\_

### How to Download Instagram on iPhone:

1. Open the itunes store with your Apple ID and download the free app: Instagram
2. Create a username and profile
3. Make sure your profile is Public not Private

### How to Download Instagram on Android:

1. Sign in to your Google Play account and download the free app: Instagram
2. Create a username and profile
3. Make sure your profile is Public not Private

If you have questions or trouble downloading the app, please contact Natalie Thurn and she can gladly assist you, (916)239-4065 or [Natalie@camgmt.com](mailto:Natalie@camgmt.com).



**We have MANY sponsorship opportunities at the upcoming CALSP<sup>ro</sup> Conference. Check it out!**

Please mark the appropriate category you have chosen and return this document along with payment to CALSP<sup>ro</sup>, 2520 Venture Oaks Way Suite 150, Sacramento, CA 95833 • 916.239.4065 • 916.924.7323/fax • [www.calspro.org](http://www.calspro.org) • [info@calspro.org](mailto:info@calspro.org)

● I will donate \$ \_\_\_\_\_

● I will be a **Pearl Sponsor – \$250**

Includes: listing in Conference on-site program, verbal acknowledgement at luncheon, logo display inside a future issue of the *CALSP<sup>ro</sup> Press*.

● I will be a **Ruby Sponsor – \$500**

Includes: logo printed on Conference signage, listing with logo in Conference on-site program, verbal acknowledgement at luncheon, logo display inside a future issue of the *CALSP<sup>ro</sup> Press*.

● I will be a **Diamond Sponsor – \$1,000**

Includes: one exhibit table, logo printed on Conference signage, listing with logo in Conference on-site program, verbal acknowledgement at luncheon and installation banquet, logo display inside a future issue of the *CALSP<sup>ro</sup> Press*, 2 complimentary tickets to luncheon and banquet.

### EVENT SPONSORSHIP:

Please check ☒ your preference(s):

■ Silent Auction Item - Please list Item: \_\_\_\_\_

■ Silent Auction Donation - Please list amount: \$ \_\_\_\_\_

■ Education Session Sponsorship – \$500 (3 available)

■ Saturday Morning Continental Breakfast – \$350 (3 available)

■ Saturday Night Cocktail Party (Drinks) – \$500 (2 available)

■ Saturday Night Cocktail Party (Appetizers) – \$500 (2 available)

■ Sunday Morning Continental Breakfast – \$350 (3 available)

■ Tee Hole Sponsor at Golf Tournament – \$75

■ Refreshment Break – \$250 (3 available)

**Yes, sign me up to sponsor!**

Total amount of sponsorship: \$ \_\_\_\_\_

Company: \_\_\_\_\_

Contact Person: \_\_\_\_\_ E-Mail: \_\_\_\_\_

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_

Address: \_\_\_\_\_

City, State, Zip: \_\_\_\_\_

So that your company name can be included in the necessary conference materials, the deadline for sponsorship submission is September 19, 2015. After this date, sponsorship opportunities may still be available, however, your company name may not be listed in come conference materials. Company logos should be e-mailed to: [stephanie@camgmt.com](mailto:stephanie@camgmt.com).

**Checks made payable to CALSP<sup>ro</sup>** (address above) or you may fill out the credit card form to the right and fax it to: 916.924.7323.

Name of Card Holder \_\_\_\_\_

Company Name on Card \_\_\_\_\_

Billing Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ ZIP \_\_\_\_\_

Credit Card # \_\_\_\_\_ Exp. Date \_\_\_\_\_

CID # \_\_\_\_\_ Amount to be charged \$ \_\_\_\_\_

Signature of Card Holder \_\_\_\_\_

Updates and Conference information will be available on the CALSP<sup>ro</sup> website (above), so please make sure you visit the site often.

Thank you to all the CALSP<sup>ro</sup> members who contribute their personal time, sponsorships and creative efforts to help make each Conference a success. Without your support, our members would not have the opportunities that they have today to operate and grow their businesses.

**• Support Your Industry! • Meet New People! • Have Fun! • See You in Las Vegas! •**



# Viva Las CALSP<sub>ro</sub>

47th Conference  
October 16-18, 2015  
Las Vegas, NV  
**Registration Form**

Company Name: \_\_\_\_\_

Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Phone Number: \_\_\_\_\_ Fax: \_\_\_\_\_ E-mail: \_\_\_\_\_

## Attendee Name:

(Print the way you would like your name badge to read)

### Full Registration – Member

☐ \$250 ☐ Late Registration \$295\*

"Member" includes all employees of a "Company" Member and Individual and Associate Members. Full registration includes all conference events.

### Full Registration – Non-member

☐ \$350 ☐ Late Registration \$395\*

### Non Member Guest

- ☐ All events \$175
- ☐ Friday Evening Only \$60
- ☐ Saturday Lunch Only \$55
- ☐ Saturday Banquet Only \$70
- ☐ Saturday Banquet Child's Plate \$15

### Golf Tournament

☐ \$125

### (CCPS) Exam

- ☐ \$10 ( Individual members)
- ☐ \$15 (Company members)
- ☐ \$30 (non-members)

**Total: \$** \_\_\_\_\_

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- ☐ \$30 (non-members)

**Total: \$** \_\_\_\_\_

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# Conference Memories

by Wendy Bowman, CALSPRO Newsletter Chairperson



I'm celebrating a milestone this year - 25 years of attending conference. I know there are many of you who can pass me by a long shot. We are preparing for our 47th conference after all. Record holder, Andy Estin, has attended 46 conferences. Perfect attendance until his mother's 90th birthday celebration in 2010 appropriately took precedence!

If we look back at our own histories with CAPPS/CALSPRO, the question is - what are your memories of your first conference?

I can recall bits and pieces of my first conference. Tom and I were dating. I knew he was very involved in the Association, but I was apprehensive to go along. I worried about meeting new people, making a good impression and, of course, the never-ending question of what to wear. The weekend-away argument must have worked, as there I was, on the CAPPS scene! I do recollect that I went shopping while Tom attended

the business meeting and lost our rental car. I learned that grey, non-descript cars are everywhere in a multilevel parking structure. I also recall that back in those days, officers and spouses were seated up on a dais during the banquet. Hoping for a nice, quiet seat in the back of the room, and we are going up front! I remember there was much hub bub over seating arrangements and the need to get the officers and spouses pinned with corsages and boutonnieres. In the middle of all of the activity, I met a very busy but welcoming Jennifer Blevins. In her kind and reassuring way, she helped me get situated and settled at the head table. Jennifer being her amazing self, but just one of those freeze frame moments we all have that has stayed with me.

The weekend went by in a blur of introductions and becoming more acquainted with the legal support profession. I often think if someone had leaned over to me at that table, in front of

a room full of people I didn't know, feeling a little uncomfortable in all my finery and told me I would still be attending this event 25 years later and would serve as an officer, a director and Chair of the Board, I would have fallen right off the platform. Never in a million years.

So fast forward and now there have probably been too many conferences to remember, but what I find every time, every year is that I get to spend a weekend with great people who care about the legal support profession. I always learn something new. I come away from conference with renewed focus and a To Do list I want to get back to my office to work on. I will have vendors to call and new ideas to implement to improve operations. And granted, getting to

*Continued on page 19*



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conference isn't easy. It always involves two of our most valuable resources – time and money. Yet, what I do know for certain and never forget year to year is that conference is a great investment of both.

Hope to see you in Las Vegas. And be sure to welcome those new faces who join us this year. You never know, just might be a future leader in our great association!

### **Jeremiah Jones**

One thing that really stood out to me was that there were a bunch of people here, with similar problems and concerns as I had, and they were all working together to try and make the industry better. Not only that, but they were all doing it on their own time and many were paying for it out of their own pockets. I remember returning home and vowing to do better after having interacted with so many great minds and great leaders within the industry. By playing a more active role in the association since then, it has given me a wealth of resources and has made my company stronger.

### **Robert Porambo**

My first CAPPS conference was in 1990. I was truly inspired by the leadership of the office and board. Their energy and passion for our industry left a lasting impression on me. Watching and listening to Joe Karotkin, Tom Bowman and Andy Estin fired me up. That members could be competitors on a daily basis and come together on important issues that affected our industry was awe inspiring. I was so charged up that I immediately got involved. I am a firm believer you get what you give.

### **Mark Schwartz**

At my first conference in 1989 I was nominated for the board but couldn't run as I hadn't been a member for a year. The following year, I ran again and was not elected. I was a bit discouraged by the result. Joe Karotkin noticed that and took me aside. He told me that I was the only person he voted for that didn't get elected. Well, I thought that if Joe Karotkin voted for me then there is hope! I ran the next year and was elected. I don't remember how many terms I served on the board since but it was that comment that kept me going.

### **Connie Melvin**

The first convention I attended was the first CAPPS Convention. Lucky for me it was held in Fresno. It was March, 1970 at the Del Webb. Sadly that was the first and last time a convention was held in Fresno! I have to say I was privileged to be in attendance and met most of the thirteen who founded our association. From that meeting I have made many long-time friends, many who helped me build my business and who gave me good direction. If ever I had a question, there was always someone willing to help. I have held almost every position and office, served on the board for many years, and worked on most committees. I am very proud of all the accomplishments we as an association have made.

### **Steve Janney**

My first conference as a CALSPro (CAPPS) member was in 1983 at the Hilton Hotel in Reno, Nevada. I had only been a member for a few months and this was my first statewide event. I was introduced to several members, including Connie Melvin-Quigley, Mick Isbell, Troy Harris, Jim Hughes, Tom Bowman, Jerry Topolos, and Pete Cunningham. I was a "wet behind the ears" rookie but they all went out of their way to include me as a new member. While each conference thereafter has had its own special memories, the first was the beginning of a profitable and exciting CALSPro membership. I remember what Dr. H. Winfield Tuttle once said. "You can't go to your second conference if you don't go to your first." I look forward to meeting many first time attenders in Las Vegas!

### **Stephanie Sayler**

My first employer in the attorney service business was Mick Isbell, Attorney Service of San Luis Obispo, in 1981. He was very involved in CAPPS and spoke highly of the association whenever the topic arose in our conversation. Whenever we forwarded work out of our area he instructed me to never use a non-member and handed me "The Book" - the CAPPS Directory of Members. Jump forward a decade and I opened my own attorney support service in Monterey County, Sayler Legal Service, on August 5, 1991. The first thing I did after getting my business license was contact Mick and ask for his assistance in immediately joining CAPPS and attending conference that year. He made it happen. I was embraced by the members and Conference helped launch my business. I had few law firm clients in the beginning, but CAPPS members sent me enough work to keep me afloat until I earned the trust of my local legal community. Paying dues was difficult that first week in business, but the reward of membership and the camaraderie of Conference has always far exceeded any dues amount.

*Continued on page 20*









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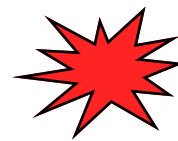
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# California Association of Legal Support Professionals

## Bert Rosenthal Memorial Award



**E**ach year the Bert Rosenthal Committee meets and makes nominations for recipients of the Bert Rosenthal Memorial Award. This prestigious award is presented to an individual who, through the years, has given the utmost of service and dedication in promoting our industry.

This award is named after Bert Rosenthal, who was a founding member of the association and one of the most respected. He had a great sense of humor, and played an integral and fun part in our association. He was always ready to help anyone who asked or needed help. He exemplified everything this award stands for.

The committee consists of the CALSPro President, all past presidents who are still members of the association, and past recipients of the award. Should there be a recipient chosen, the name will be announced at the CALSPro Conference in October.

### The Nominees for 2015 Are:

**Chad Barger**  
**Jennifer Blevins**  
**Mary Beaudrow**  
**Wendy Bowman**  
**Michael Kern**

### Past Rosenthal Recipients

<b>1978 Bert Rosenthal (In Memoriam)</b>	<b>1997 Paul R. Anderson</b>
<b>1979 Michael Buter</b>	<b>1998 Robert A. Cook</b>
<b>1980 Andrew R. Estin</b>	<b>1999 Jeffery H. Karotkin</b>
<b>1981 Richard J. Green</b>	<b>2000 Edward R. Wasserman</b>
<b>1982 Not Awarded</b>	<b>2001 Robert D. Alkema</b>
<b>1983 Carl Strang</b>	<b>2002 Al Crowe</b>
<b>1984 Hugh Hallenberg</b>	<b>2003 David S. Nill</b>
<b>1985 Connie R. Melvin</b>	<b>2004 Mark L. Schwartz</b>
<b>1986 Jaunita Tanzer</b>	<b>2005 Ronald Ezell</b>
<b>1987 Not Awarded</b>	<b>2006 Paul Tamaroff</b>
<b>1988 Not Awarded</b>	<b>2007 Jerry Topolos</b>
<b>1989 Elaine J. Erdman</b>	<b>2008 Jack Janney (posthumous)</b>
<b>1990 Thomas J. Bowman, Jr.</b>	<b>2009 Herbert E. Hoffman</b>
<b>1991 Michael O. Price</b>	<b>2010 Not Awarded</b>
<b>1992 Joseph H. Karotkin</b>	<b>2011 Steven Janney</b>
<b>1993 Not Awarded</b>	<b>2012 Mike Belote</b>
<b>1994 Frederic A. Blum</b>	<b>2013 Brett Peters</b>
<b>1995 Tony Klein</b>	<b>2014 John Perez</b>
<b>1996 Not Awarded</b>	

# TO INSTAGRAM AND BEYOND!



**Kenneth Hastings**  
**CALSPRO Director, Technology Chairman**

**A**s process servers, we are faced with many challenges. Sometimes these challenges overlap from work to home. Even though we typically use social media to interact with our friends and family, it can also be used as a very effective tool at the office.

A process server may find that service of an individual who would rather not be found can be quite difficult. The first step as most of you already know is to run a skip trace and in many instances, this will prove to be a useful endeavor. On other occasions, a skip trace may provide you with information that isn't current or even valid in some instances. With the client's voice ringing in our heads, "just get the guy served", where can we turn? I am finding social media to be a great alternative resource & here is an example:

In this case the information leads to many addresses in the Inland Empire and Los Angeles County. None of which turn out to be valid addresses. So what's next? Well, hopefully the subject has a chink in his armor - a way to find someone who doesn't wish to be found.

In steps the public world of social media. We start searching for our subject on Instagram with no luck. However, our subject is married. We are able to locate his wife and we are on the trail. She is

found on Instagram promoting a new wedding company and venue. Service attempts immediately begin at the address of the wedding venue. One problem, the venue has a security gate and a callbox with no intercom speaker. A month's worth of attempts go by and still no access to the property. Then Eureka! An Instagram post goes out confirming that she has booked her first wedding and the most important piece of information - the date. On the morning of the wedding, a server approaches the property, figuring that the gate would be open for guests to arrive at their leisure. And sure enough, the gate was open. The server was able to locate the subject and effect personal service.

Had it not been for the use of a social media application this subject may have never been served personally. As we progress as a society that likes to share personal information, it only becomes increasingly more important for process servers to know which apps are available and how to use them. Everyone knows about Facebook and Twitter but that's just the tip of the

*Continued on page 24*

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[service@hastingspps.com](mailto:service@hastingspps.com)

### WEBSITE

Michael Kern  
213/483-4900  
[mkern@kernlegal.com](mailto:mkern@kernlegal.com)



iceberg. Below is a list of other commonly used social media applications. Keep in mind that these are apps that are common today but the list of social media apps is everchanging.

**Texting apps:**

Kik Messenger  
ooVoo  
WhatsApp  
Micro-blogging apps and sites:  
Instagram  
Tumblr  
Twitter  
Vine

**Self-Destructing/Secret apps:**

Burn Note  
Snapchat  
Whisper  
Yik Yak

**Chatting, Meeting, Dating apps and sites:**

MeetMe  
Omegle  
Skout  
Tinder

I would like to personally encourage all members of our association to familiarize yourselves with at least a few of these apps. Find out which apps suit your specific needs and begin to test them out for yourselves. Use them in cases where you skip trace information has yielded solid information. Validate the skip trace using social media. As you become more familiar and savvy with these applications, you will find good ways to utilize them for locates where a skip trace has failed.

On a side note, CALSPro will be using Instagram at this year's annual conference for a Photo Scavenger Hunt. We will be using the hashtag #CALSPro2015. If you already have an Instagram account you will be able to see your colleagues in Las Vegas using this hashtag. We hope to see you there.

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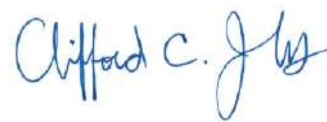
PRESIDENT'S MESSAGE – *continued from page 4*

The membership article later in this issue details our ongoing and two brand new membership promotions, and also highlights some of the valuable membership benefits that we have secured for you. In addition, we have reached out to several other Associations outside California this year to create Associate member relationships that will benefit our members when sending work to that state. Most recently, the Texas Process Serving Association asked for our permission to place our new Guide on what to do if assaulted (presented at the NAPPS Conference in April/May) into their Conference bag as a bonus for their membership later this month. This Guide is available on our website at the

Forms tab under the Resources section at bottom. They will also forward a CALSPro promotional flyer to their membership on our behalf. Hopefully, it will result in additional Associate members from Texas committed to providing excellent service to CALSPro members. The Texas association was looking for opportunities to establish more committees similar to ours. I suggested that they consider coming to our upcoming conference and get a feel for who we are as an association, a deeper understanding of our committees, and to interact with our members.

I also want to invite and encourage all of our members to come to conference this year at the Monte Carlo in Las Vegas, and

bring with you a sense of adventure as we look toward the future of our profession and our association. You will have a great time networking with other members, engaging in our education, and sharing camaraderie and fun.





## Continued Industry Changes

**By Tom Alkema**

**Ronsin Litigation Support Services**

**T**hings have certainly changed over the past few years for those of us who perform photocopy services in California. I know that could be said about all businesses in our association but I think it is now even more so for the photocopy industry. Up until about four years ago we had been afforded the luxury of operating in an environment that was, for the most part, unimpeded by change that significantly threatened our operational systems. When things did pop up that could impact our industry, namely changes in the law, CALSPRO effectively worked to keep them at bay.

For example, back in 2012 there was an attempt by the release of information companies, ROI's, to increase the fees they can charge when producing records; this was effectively dealt with. They took another bite at that apple in 2013 to once again be overruled by our legislative component. In 2014 and 2015 they have thankfully remained on the sidelines. It took the effort of some very attentive CALSPRO members and people with the right experience and knowledge to protect our businesses and the consumers in California.

As beneficial as our efforts have been with the ROI companies, there was, however, legislation passed in the workers compensation legal field in 2012: SB 863. After the bill was signed into law it wound its way through the system for the next 2 years and 9 months while rules and regulations were being crafted. During this time, many photocopy services worked together to gain input from State regulators. Surveys were completed and meetings took place with stakeholders. In the spring of this year the State rolled out the final rules and as of July 1st 2015 those performing photocopy services in a workers compensation matter MAY be required to make significant changes to the structure of their bills as well as the fees they can charge.

Here are a few of the highlights found in the regulations:

- Instead of a per page fee and itemized fees for subpoena preparation, mileage, and other related fees, a flat fee of \$180 covers records of 500 pages and under and includes mileage, postage, delivery, phone calls, page numbering, witness fees, release of information fees, and subpoena preparation.

- Separate charges are allocated for cancellations, certificates of no record, for records obtained from EDD and WCIRB, and for additional sets for records.
- For copies above 500 pages, an additional .10 cents a page is allowed.
- Bills for copy services must include provider tax ID numbers, professional photocopier numbers, and claim numbers and may include newly created billing codes.

If you want to see the full context of the rules you can go to the following link: [www.dir.ca.gov/dwc/DWCPPropRegs/CopyServiceFeeSchedule/CopyServiceFeeSchedule.htm](http://www.dir.ca.gov/dwc/DWCPPropRegs/CopyServiceFeeSchedule/CopyServiceFeeSchedule.htm).

While my focus thus far has been on legislation related specifically to photocopy services, we all know legislation is, by all means, not the only arena where we are facing challenges. Here are some additional things to consider, both legislatively and operationally, when thinking about changes in photocopy services:

*Continued on page 26*

- The challenges we do or may face as e-service proliferates through our industry.
- The increasing number of facilities that have migrated to electronic medical records and how that impacts the production of records
- The rise of ROI companies and their lackluster response to requests for records; both in regard to the slow responses and the issue of incomplete records.
- Possible class action suits against companies, mostly ROI entities, for charging fees outside of the current codes.
- The critical need to build and maintain an environment for data and private health information that is secure and HIPAA compliant.
- Labor laws and employment challenges, i.e., minimum wages rising to \$15.00 per hour.

- Changes in technologies we use to run our businesses.

So where do we go from here???

I was asked by the Chairman of the Legislative Committee to form a subcommittee that will focus on possible legislation in 2016; to that end I am currently working with several other photocopy companies. What we come up with, if anything at all, will be shared as it materializes. I encourage you to contact me to discuss your thoughts on the subject if you feel that you can contribute.

A real practical step many CALSPro members can take would be to attend the annual conference in Las Vegas. This issue of the CALSPro Newsletter is primarily focusing on this topic; I only hope I am not beating what may be by now a dull drum. At the conference I cannot promise any direct conversations from the podium about photocopy issues

but I can assure you that if you make the effort to attend you can always find time to have conversations with others in our branch of the legal support industry. If you attend conference I would be happy to spend time discussing things related to our industry.

Thank you for this opportunity to share my thoughts and I really do hope to see you at the conference.



## GOT SOCIAL MEDIA?

CALSPro is proud to announce that we're now on the major social media platforms. We are continuously posting information and updates for the benefit of our members. Connect with us to get the latest news, technology and court updates:

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- AB 1513 (Williams): Piece-Rate Employees. Creates a safe harbor for employers to avoid penalties for past minimum wage violations concerning piece-rate workers, as articulated in the Gonzalez and Bluford decisions, and requires on a going-forward basis that piece-rate workers be compensated for rest and recovery periods at an average hourly wage. On Governor's Desk.
- SB 8 (Hertzberg): Sales Tax on Services. Imposes a sales tax on all services in California except health care, education and certain microenterprises. Two-year bill.
- SB 340 (Anderson): Dissolution Disclosures. Modifies the law concerning preliminary declarations of assets in dissolution proceedings where the summons and complaint were served by publication or posting by court order and the defendant has defaulted. Signed by Governor-Chapter 46, Statutes of 2015.
- SB 641(Wieckowski): Debt Buyers. Creates a procedure for default defendants in collections cases brought by debt buyers to set aside defaults based upon a lack of service and inability to defend the action. On Governor's Desk.

*Michael D. Belote*



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**T**his year as a primary focus, the membership committee committed to providing more member benefits and added value for members. We implemented two brand new membership promotions that provide great value to you, and continued our discounted membership promotions, where a company member can add new individual members at half price (\$100), and where an individual member would receive a \$100 discount to add or upgrade to a company membership. These ongoing promotions already provide savings to our members, but we wanted to do even more, so we established a REFERRAL incentive which will reduce your dues at renewal and allow your referral to join at a reduced fee, and a DEFERRAL plan to help company members with dues renewal:

#### **REFERRAL:**

The referral program is win-win for both the existing member and also the prospective new member. The existing member can offer a \$50 discount to someone that they refer to become a member. The new applicant gets the \$50 off of their initial membership fee, while the existing member receives a \$50 reduction on their renewal fee. Existing members that refer an additional new member will receive an additional \$50 renewal credit. That's significant savings. As an added perk, the new member upon approval, can immediately begin referring others to join and will be able to offer the discount to them, as well as receiving renewal credit as well. It is like a gift to both.

Some of the other benefits that we encourage our members to take advantage of are:

- Special reduced member rates to attend our CCPS Workshop and certification exam.
- Special member rates to attend our Annual Conference (this year in Las Vegas)
- Discount at 1-800-flowers
- Discount at Jiffy Lube
- Special pricing from some of our vendor members listed here:
  - o American Legal Net – Desktop to court house work flow solution
  - o CFC-Top Priority-Daily pouch and overnight services
  - o Confidential Record Specialists – Paper shredding and document management service.
  - o EMR Legal, Inc. - HIPAA Compliance Specialists
  - o Garza Industries – Office Supplies
  - o ISD Corporation – Court E-Filing Portal Application
  - o Paychex – Payroll and Employee Benefit Services
  - o ServeNow.com – Process Serving Directory, Software & Education
  - o Sharp Business Systems – MFP equipment, display systems, point of sale equipment
  - o Tristar Software-Attorney service software solutions
- A free printable, 2 sided tri-fold Guide on what to do if you are assaulted. Print it out and put it in your glove box. You can find it on our website under Resources – Forms. We hope you never have to deal with this, but if you do, this guide will help you take all of the right steps after you have been assaulted.





# EDUCATION

## Continuing Education Presents: Did you know...?

Did you know that if attempting to serve papers on an attorney at his office under CCP 1011(a), if the attorney is not there (and certain specific conditions are met) you can actually leave the documents for the attorney “between the hours of nine in the morning and five in the afternoon in a conspicuous place in the office”.

However, if serving the attorney at the attorney’s residence, although the hours specified are “between the hours of eight in the morning and six in the evening”, per CCP 1011(b) you must leave the papers “with some person of not less than 18 years of age.” There is nothing in the code that provides for leaving the papers in a conspicuous place at the residence. Remember that the next time you are asked to drop at the doorstep, or between the screen and main doors.

### And from around the Nation and the World:

Did you know that judges’ robes were not always black. In fact, they used to be as colorful as predicated by the fashion of the day. However, to mourn the death of Queen Mary II in 1664, judges wore black robes... and never changed back to another color.

Did you know that in 1313, King Edward II enacted that “You are forbidden from dying in parliament.”

Did you know that in Washington State, it is against the law to boast that one’s parents are rich.

Did you know that in Texas, two categories of men are exempt from peeping tom charges: men over 50 and men with only one eye.

Did you know that in Normal, Oklahoma you could be sent to prison for “making an ugly face at a dog.”

### Local Code - Guess Your Best

1. In which city are you not permitted to wear cowboy boots unless you already own at least two cows?  
A) Bakersfield      B) Blythe      C) Chatsworth
2. In which city is it illegal to spit except on baseball diamonds?  
A) San Jose      B) Burlingame      C) Stanford
3. In which city is it illegal to ride a bicycle in a swimming pool?  
A) Bel Air      B) Baldwin Park      C) Beverly Hills
4. In which city do Peacocks have the right of way to cross any street, including driveways?  
A) La Jolla      B) Arcadia      C) San Clemente
5. Which city’s City Council order reads: “No dog shall be in a public place without its master on a leash.”?  
A) Compton      B) Belvedere      C) Playa Vista



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## FEATURES for 2015

### Automatic Order Entry:

- Import ISD Electronic Filing Orders for Clients.
- Import Clients, Affiliates (with Data Base synchronization), LAWDEX, & Internet.



### Server Attempt, Bad Address, & Completion Entry:

- Import Coded Replies, Photos with GPS Meta Data, or Free Form Notes from Servers, & Affiliates (with Data Base synchronization).

### PDFStore:

- Making a paperless office possible.
- Two Mouse Clicks from finding documents, Original Papers, Server Notes, Conformed Copies, etc. using: Case Number, Attorney File Number, Tracking Number, and Client Matter Number.
- Full ADOBE functions, display, print, e-mail, etc.

### Integrated E-Mail:

- Send Servers assignments including GOOGLE map link.
- Receive Servers Notes.
- Receive Servers Coded Responses: updating Serve Information & Attempts, using Smart Phones (save fat finger entry with microphone, "speak to your data base").
- Receive Smartphone Photos with GPS Meta Data for conformation & reporting.
- Receive Notes, Instructions from Clients.

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# At Your Service and Supporting Our Association

By Robert Porambo - Advertising Chair

**Check out the list below and keep it handy. These companies are vendor members and offering their valuable services to CALSPRO members.**

**EMR Legal, Inc.** – HIPAA Compliance Specialists

**ISD Corporation** – Court E-Filing Portal Application

**Paychex** – Payroll and Employee Benefit Services

**ServeNow.com** – Process Servings Directory, Software & Education

**Sharp Business Systems** – MFP equipment, display systems, point of sale equipment

**Tristar Software** – Attorney service software solutions

**We would like to welcome our two newest vendor members: American Legal Net, a desktop to court house work flow solution (alncorp.com) and Confidential Record Specialists, a paper shredding and document management service (crspapershredding.com).**



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