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THE OFFICIAL QUARTERLY NEWS & OPINION MAGAZINE OF THE
CALIFORNIA ASSOCIATION OF LEGAL SUPPORT PROFESSIONALS

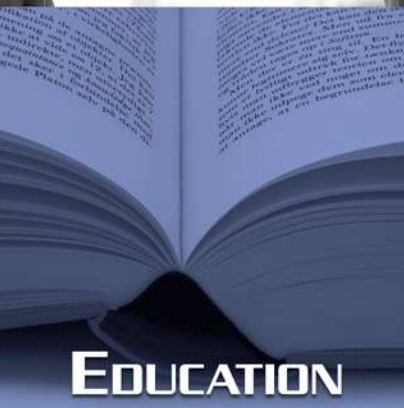
Volume 5 / Issue 3 / Fall 2012



LEGISLATION



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CONFERENCE



44TH CONFERENCE

Sheraton Park Hotel at the Anaheim Resort
— October 5-7, 2012 —

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CALSPRO 44th Conference

Get ready for the CALSPRO Conference 2012 and bring along the family to enjoy **Disneyland**. The CALSPRO Conference returns to its usual date of Columbus Day weekend – October 5-7 and will be held in Anaheim.

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CALENDAR Of Events...

44th CONFERENCE & BOARD MEETING
October 5, 2012 - Anaheim, CA



President's Message

CHAD BARGER

2012 CALSPro PRESIDENT

In my last article, I addressed the issue of "bad press" and some ways we can combat it through education and professionalism. Now, the issue of sewer service has been raised here in California. Currently, there are 14 pending cases of alleged sewer service being heard in Federal court in San Francisco. CALSPro is aware of these cases and is monitoring their progress very closely. The decision of these cases could potentially impact the protection that process servers have while serving collection cases under the Fair Debt Collection Practices Act (FDCPA). An unfavorable ruling could cause a drastic change in the way we conduct business.

There are some of us in the know of what CALSPro has accomplished over the past 43 years, and we have relied on its strength and expertise in protecting and preserving our profession. However, to many process servers, other legal support professionals and even the general legal community, CALSPro is one of the best kept secrets in California. We are working hard to change that. Process servers all over the State, and in a way across our nation, are benefiting from CALSPro's legislative triumphs even though they may not be a member or even know who we are. Just this year alone, CALSPro has had great success in defeating several bills that would have changed the landscape of process serving.

SB1543

A Photocopy bill regarding patient records: inspection and copies.

This bill would prescribe the fees for a health care provider or medical records

management company to charge when providing copies of medical records to an attorney. It would also provide that an electronic copy of a medical record is required only if the entire request can be reproduced from an electronic health record system and can be delivered electronically. Further, the bill would require the Secretary of California Health and Human Services to make annual determinations concerning any increase or decrease in the fees in accordance with the Consumer Price Index prepared by the United States Department of Labor. (CALSPro caused the bill to be pulled by the Author)

AB2044

Initially proposed as a Pre-Judgment Claim bill.

This bill would have allowed service of a Pre-Judgment Claim by anyone over the age of 18. Rather than by a Sheriff, Marshall or Registered Process Server. (CALSPro defeated the initial proposal in committee. The bill has since been hijacked and now has to do with filing a motion for a new trial.)

AB2372

Deposition transcripts: costs.

This bill would have allowed service to an attorney by mailing to the last known address listed on the State Bar website. (CALSPro convinced the Author to remove the service by mail wording.)

CALSPro will continue to champion due process in order to preserve, protect and promote our livelihood well into the future.

California is considered by many a trend setting state, especially regarding the service of process; and in fact we are one of the most regulated states in our nation. This is why we place so much emphasis on educating process servers. Our state association first began an education program for process servers in the early 80's; which included testing and ultimately certification, designating those who demonstrated exceptional knowledge and passed the test as "CCPS," **C**APPS (now CALSPro) **C**ertified **P**rocess **S**ervers. Our early commitment to education and certification has ensured our growth, strength and professionalism. For a state that does not require certification, the very fact that we place so much emphasis on education, training and certification speaks volumes of our commitment to this profession, and to effectuating valid, proper and legal service. It is truly a testament that we as an association, and as a state embrace the values and principles of due process as provided for and guaranteed in our Constitution's Bill of Rights. We should all take advantage of the educational opportunities that are available to us, including sitting for the certification exam, and maintaining current status as CCPS; and this is so now more than ever, with the public eye being directed to those few, notorious "bad apple" servers.

The year is more than half over but there is still so much to accomplish. You should know that the entire Board has been

Continued on page 15



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Capitol Report

MICHAEL D. BELOTE, ESQ.

CALIFORNIA ADVOCATES, INC.



Legislation Session Nears End

California may operate under what is described as a "full-time legislature", but in fact the legislative year consumes just two-thirds of the calendar. The legislature begins each year early in January, and typically adjourns in early to mid-September. In even-numbered years such as this one, the state constitution requires that the legislature adjourn by midnight, August 31. Since this is the end of the current two-year 2011-2012 session, nothing carries over from this year to the next. Everything passes or fails, and a brand-new session begins next year.

While in the macro sense the big issues for the legislature this year were budget, pensions, high-speed rail, and foreclosures, CALSPRO still had a very busy year. The good news is that, with only weeks remaining in the legislative year, it appears that no legislation harmful to service of process or photocopying will be enacted this year. But at a recent CALSPRO Board meeting, directors still noted just how many issues had been addressed by the association in the Capitol.

A more complete summary will appear after the Governor completes his review of bills sent to him by the end of August, but the following bills are of note at this time:

- **AB 1720 (Torres): Gated Communities.** Amends the CALSPRO-sponsored law relating to service in guard-gated communities to permit private investigators to have access solely for purposes of service

of process. The bill applies only to the licensed PI, not to unlicensed employees. AB 1720 has already been passed and signed by the Governor, effective January 1, 2012, as Chapter 113, Statutes of 2012.

- **AB 2073 (Silva): Electronic Filing.** Permits Orange County to establish a pilot project to implement e-filing. Essentially gives the county statutory authority to continue the e-filing system presently in place. CALSPRO has been working to make sure that e-filing charges are recoverable costs.
- **AB 2372 (Hill): Deposition Transcript Costs.** Originally would have permit mailed service to any lawyer named in a lawsuit. Amended to require attorneys who are judgment debtors in actions for nonpayment of transcript costs to provide an actual address for service of process. Signed by the Governor as Chapter 125, Statutes of 2012.
- **SB 890 (Leno): Debt Buyers.** Proposes major changes to laws relating to collections of debts by debt buyers. Originally would have applied to anyone "acting on behalf of a debt buyer", which likely would have included process servers. This language was deleted. The bill failed passage in the Assembly Banking Committee, but could be revived in the final days of session.

- **SB 1543 (Emmerson): Medical Records.** Proposed major changes in the laws relating to inspection and photocopying of medical records. Would have very dramatically affected CALSPRO photocopy members. Would have expressly permitted health care providers to copy records through their agents. The bill has been held for this year without hearing. CALSPRO will be involved with discussions on this in anticipation of another bill being introduced next year.

The big event after the Governor completes his review of the bills prior to the end of September, is the general election on Tuesday, November 6. And the biggest initiative on the ballot is Proposition 30, the Governor's tax measure. Of obvious significance to all of us as California residents, the issue is of special interest to CALSPRO for this reason: although courts are not identified as a target of "trigger cuts" if the initiative fails, it is possible that all state services, including courts, could be back on the table when legislators must find another \$8 billion in cuts. There appears to be absolutely no interest in any further increases in civil filing fees, from any quarter, so further reductions in judicial branch funding would be especially devastating. 🐼



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Welcome to the 44th CALSPro Conference at the Disneyland[®] Resort

by Stephanie Saylor, 2012 Conference Chairperson

This has been an active year for our industry and attending our Conference will be an enjoyable way to get current on industry events. Treat your family to a fun adventure by including them in your travels. CALSPro has made arrangements for conference attendees to receive a discount on park tickets! The Disneyland[®] Resort includes California Adventure Park, Downtown Disney[®] and Disneyland[®] Park. See the Conference brochure for details and shuttle information, as our venue features fabulous shopping, entertainment, dining, adventurous rides, movies and more.

During Conference this year, take advantage of this forum to reacquaint yourself with other members. Our Friday night is a free evening to gather with friends at 6:30 pm at Bar Louie (a short walk from our hotel), and/or take in some exhilarating rides at Disneyland[®] Resort. Fear loves company, so grab a business associate to brave a ride on the Twilight Zone Tower of Terror!

Compete with your fellow associates in bidding on our Silent Auction items. You won't want to miss a chance to bid on a gift for yourself or loved one during our Conference, and the bounty will be displayed amongst our exhibitors. Not to be outdone, peruse these bid sheets often so you don't lose your prize possession! While loitering around the bid sheets, take the opportunity to visit our exhibitors and discover the fabulous services and products being offered to our membership. The exhibitors are here to support you and grow your business. They provide solutions to our specific industry needs, so please visit each and every one of them (while you covertly cover the highest bidder on your silent auction item!).

Our educational sessions are very informative again this year. Please attend Saturday's presentations as our speakers are here to invest time in you. CALSPro members are the most professional people in our legal support industry; and it is you, the member, that earns our

reputation. By attending all the events on our schedule, you stay informed and knowledgeable. Let us help you provide the legal community with a standard of professionalism and exceptional service expected of a CALSPro member.

Remember, it's at Conference that you are informed of our legislative updates during our annual business meeting. This is also the time that we elect our board and steer the future of our association. Please attend, be active and consider volunteering to serve on one of our various committees.

Don't miss the hot breakfast buffet with family and friends on Sunday morning starting at 7:30 am! There will be prize drawings and a final chance to visit with exhibitors and say your good-byes at the close of our Conference. I look forward to seeing all of you and enjoying our time in Anaheim.

Safe travels, Stephanie Saylor 🐼

"The Happiest Conference on Earth"





CALSPRO

CALIFORNIA ASSOCIATION OF
LEGAL SUPPORT PROFESSIONALS

44TH CONFERENCE

Sheraton Park Hotel at the Anaheim Resort
— October 5-7, 2012 —

CONFERENCE SCHEDULE

FRIDAY, OCTOBER 5, 2012

8:00 Shotgun Start

16th Annual CALSPRO Jack C. Janney Memorial Golf Tournament – Tustin Ranch Golf Club

4:00 pm – 5:00 pm

Board of Directors Meeting

5:30 pm – 7:30 pm

Registration Open/Exhibitor Set - up

Evening on your own to visit Disneyland®, gather with friends and enjoy the local area and attractions or meet friends at 6:30 pm at Bar Louie, a short walk from the hotel for a gathering with friends and associates.

SATURDAY, OCTOBER 6, 2012

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, Legislative Update with *Mike Belote, Esq. California Advocates, Inc.* Nominations Open for the Board of Directors.

10:30 am – 11:00 am

Exhibitor Break and Exhibitor/ Presentations

11:00 am – 12:00 noon

CONTINUING EDUCATION SESSION:

SEO Marketing – *Adam Camras/Trent Carlyle, ServeNow.* This session is a must for business marketing.

12:00 pm – 1:00 pm

Networking Luncheon Buffet and Bert Rosenthal Memorial Award Presentation

1:00 pm – 2:00 pm

CONTINUING EDUCATION SESSION:

Copy Industry Update– *Mick Isbell, First Legal Support.* This session will focus on where the industry is headed, recent legislation/bills threatening the industry. A must for anyone who handles photocopying or is interested in it.

2:15 pm – 3:15 pm

Annual Business Meeting continued

Nominations, Elections, Committee Reports & Bylaws Report

3:30 pm – 5:00 pm

CONTINUING EDUCATION SESSION:

Case Law Presentation – *Four speakers will provide information on past and present case law. Gary Hansen will present *Ludka v. Memory*, and *Crescendo v. Shelted*; Tony Klein will address *Carol Gilbert, Inc. v. Haller* (2009), and *Palm Properties v. Yadegar* (2011); Andy Estin will cover *Trujillo v. Trujillo*, and *In Re: Ball* (drop service); and Jeff Karotkin will discuss *Rio Properties, Inc., Plaintiff-Appellee v. Rio International Interlink, Defendant-Appellant*, and how it helped shape electronic service of process over the past decade. You won't want to miss this session.*

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

SUNDAY, OCTOBER 7, 2012

7:30 am – 8:30 am

Registration and Exhibits Open

7:30 am – 8:30 am

Hot Breakfast Buffet with Family and Friends

Come Fuel Up Before Your Disney® Day. Visit with CALSPRO friends. Bring your family. Exhibit prize drawings will be held during breakfast.

8:30 am – 10:00 am

CCPS Examination Review and Exam

10:00 am

**CONFERENCE ADJOURNS -
THANK YOU FOR ATTENDING**



REGISTER ONLINE:
www.calspro.org

**CALSPRO**CALIFORNIA ASSOCIATION OF
LEGAL SUPPORT PROFESSIONALS**44TH CONFERENCE****Sheraton Park Hotel at the Anaheim Resort
— October 5-7, 2012 —**

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Phone Number: _____ Fax: _____ E-mail: _____

Attendee Name:

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Full registration includes all
conference events.

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- ☐ All events \$175
☐ Saturday Lunch Only \$55
☐ Saturday Banquet Only \$65
☐ Saturday Banquet Child’s Plate \$15
☐ Sunday Hot Breakfast Only \$35**

Golf Tournament☐ \$125**(CCPS) Exam**

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

Total: \$ _____**Attendee Name:**

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- ☐ \$10 (Individual members)
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☐ Saturday Banquet Child’s Plate \$15
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Golf Tournament☐ \$125**(CCPS) Exam**

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

Total: \$ _____* Registration must be postmarked by September 10th to avoid additional fees. ** Children of registered attendees may attend Sunday breakfast at no charge.**PAYMENT OF FEES:****GRAND TOTAL: \$** _____☐ Check (payable to **CALSPRO**) ☐ AmEx ☐ Visa ☐ MasterCard

Cardholder Name: _____ Address: _____

Card Number: _____ Exp. Date: _____ 3-4 Digit Security Code: _____

Signature: _____

Please feel free to make copies of this form for additional registrations.

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The 2012 Donald C. "Mac" MacDonald Award NAPPS Annual Conference, Boston

by Wendy Bowman

2011-2012 Newsletter Chair

In 2001, the NAPPS Board of Directors unanimously voted to establish an award to be given to a member who has "demonstrated professionalism and distinguished service to our association and the process serving profession". Donald C. "Mac" MacDonald was the first recipient in 2002. The award was named in his honor and has since been given to Alan H. Crowe, Andrew R. Estin, Frederic A. Blum, Thomas J. Bowman, Jr., Herbert E. Hoffman, Ronald R. Ezell, Susan Collins, Tony Klein and John Perez. At this year's NAPPS Conference, CALSPro (CAPPS) was awarded this esteemed honor for the role that CAPPS played in the defeat of the amendment to Rule 4 of the Federal Rules of Civil Procedure and the founding of NAPPS. This is a great honor and we congratulate CALSPro, particularly those CAPPS members who were willing to make the sacrifices necessary to achieve these impressive accomplishments.

In early 1982, it was discovered by CAPPS members that the US Supreme Court had adopted an amendment to Rule 4 of the Federal Rules of Civil Procedure. This would allow the service of a federal summons and complaint by mail, virtually putting an end to service of process as we know it. By May, 1982, the CAPPS Board of Directors had voted to undertake extraordinary measures to defeat this pending legislation. This became known as The Federal Project.

Having sat on the Board now for a number of years, I have seen firsthand how much thought and consideration is given to a difficult issue. I cannot imagine the lengths that the 1982 CAPPS Board of Directors went through in voting to raise and expend up to \$50,000 and to immediately put a plan into action that would send the CAPPS lobbyist and Legislative Chairman to Washington, D.C. Even by today's standards, a vote by our Board to expend



that kind of money on a non-budgeted item would be remarkable. In 1982, 30 years ago, CAPPS leadership endeavored on a very bold, courageous and expensive mission to halt the change to Rule 4.

The CAPPS budget was insufficient to cover the expense of the Federal Project, so President Dick Green's first priority became fund raising. In June 1982, Mr. Green addressed the membership again, summarizing the financing necessary to defeat the legislation and confirmed that 78% of the monies collected thus far were contributions from CAPPS members.

In October 1982, at the CAPPS Annual Conference, CAPPS leaders and representatives from 10 states, including Ron Ezell, Mac McDonald, and Fred Blum, met to form NAPPS and to continue discussion on the Federal Project. It was agreed during those meetings that the Federal Project was best left in the hands of CAPPS leadership, and in doing so, Rule 4 was successfully defeated. It was also agreed that a national association must be formed in order to continue financing the federal legislative effort and to protect and preserve the industry then and in the future. NAPPS' president was Andy Estin and Tom Bowman its first legislative chairman.

The defeat of Rule 4 and the formation of NAPPS are truly great moments in our history and deserve to be commemorated. To our CAPPS leaders and membership directly involved, we celebrate your hard work, commitment and great sacrifices to see it through. By all accounts, the CAPPS Federal Project and role played in the founding of NAPPS demonstrated utmost professionalism and distinguished service to our Association and the process serving profession. Congratulations to all involved.

The following are excerpts from Andy Estin's Donald C. "Mac" MacDonald presentation at the 2012 NAPPS Annual Conference:

We all know that NAPPS was formed to stop Rule 4 and that NAPPS hired Herb Hoffman to do it. Except that none of that is true!

You all received a book on NAPPS History. Gary Crowe did a beautiful job producing it for you. In the book there is a letter from Richard Green, the President of CAPPS, dated May 4, 1982. This was five months before NAPPS was formed. It is addressed "Dear CAPPS Members" and talks about

Continued on page 16

Ten Ways to Stay Current in the Fast Evolving World of Legal Support

Cliff Jacobs, 2011-2012 CALSPro Vice President

“Even if you are on the right track, sooner or later you will get run over if you just sit still” — Will Rogers

1

Educate Yourself

- Attend Professional Workshops, Seminars and Legal Tech Conferences
- Read, learn and understand the codes that affect our profession
- Understand the trend within law offices to meet their evolving needs

2

Join, Participate and/or Sponsor with Local, State and National Associations

- Process Serving, Photocopy, Investigation and Collections Associations
- Secretary, Paralegal or Legal Professional/ Assistant and Bar Associations
- Chambers of Commerce, Business Groups and Service Organizations
- Sheriff, Marshall and Constable Associations

3

Join Topical Usergroups and Newsgroups, and Stay Current with Discussions

- Observe trends and use foresight to predict likely directional shifts
- Identify top commentators and follow their posts

4

Make a Commitment to Educate Your Staff and Contractors

- Encourage or require participation in training programs and events
- Bring Educators and Experts to provide in-house training
- Take advantage of online educational opportunities (see www.CALSPro.org)

5

Sign Up for Public Notices from the State and Federal Courts in your Area

- Be among the first in your area to receive alerts and info blasts
- Forward relevant info in a newsletter or e-blast to your clients

6

Read and Follow Professional Publications, Trade Magazines, Newsletters and E-zines

7

Use Social Media and Locate Blogs that Keep you Informed

- Check in daily to stay current
- If available, sign up for auto-notification when new content is released

8

Follow Proposed Legislation and Legislative Digests on Matters of Potential Concern

9

Educate Your Clients and Customers

- Host trainings for your customers at your site or theirs
- Forward upcoming MCLE opportunities as a service to clients

10

Embrace Changing Technologies, Keep your Website Fresh and Lively, and Improve your Timelines and Methods of Delivering Information to your Clients and Customer

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Technology Committee Report

by Richard C. Stitts, Jr.

Using 21st Century Technology to Create Your Mobile Office



Every process server in the business has received Rush assignments and at some time or another had to turn it down because you were already out in the field and simply didn't have time to get back to the office to print out the documents to serve or file in a timely manner, right? Well, in this article I am going to show you how you can set up your mobile office and never have to worry about turning down business or missing another job again. Here are some tips for turning your vehicle into a mobile office for just a little more than \$100! *(This article assumes that you are already using a smart phone or tablet as most of us do by now.)*

I looked online for all the components you should need to set up a mobile office and found that there are several ways to do it and none of them are very expensive at all. The simplest way is the following:

Start with the HP Photosmart D110 printer which easily works with most iPads and iPhones. You don't have to get this one necessarily, but they are simple to work with and inexpensive. I checked and these retail for around \$50-\$75 on Amazon.com. These are relatively small and will easily fit in the back seat of just about any vehicle.

Next, you will need a wireless router. Just about any brand will do, but shop for one that has a longer range as this will serve you well while in the field. These are also very inexpensive. I found a Netgear RangeMax WNR1000 Wireless Router for sale online at J&R for \$34.99. But the ones with longer range will retail for approximately \$64.99-\$170, depending on the range.

Lastly, you will need a power inverter to convert DC power to AC power in your car. If you aren't really savvy when it comes to electrical currents and that sort of thing and this doesn't make sense to you, this would be the time to just trust me on this on and purchase one. You can purchase a 150 Watt power inverter at Walmart or online at any electronics store for approximately \$29 to \$89, again depending on the features.

Additional items may include a small extension cord, small roll of duct tape, and maybe some Velcro for a nice and easy install in your vehicle.

Once you purchase these items, you will want to complete the one time set up of your router first by using your home or office computer. Simply insert the disc and follow the instructions for installation and

setup provided in the box to do this. Again, even if you are a little computer illiterate, step by step instructions are provided to make this a very simple job and not overwhelming at all.

Once your router has been configured and set up, you'll want to set up your printer. If you are going to be printing from an iPad, you won't need to follow the instructions from the disc for setup. Simply follow the instructions to connect to your wireless router (wifi router with internet). Allow printer to download new firmware which will allow it to sync with your iPad or iPhone. You will then switch wifi settings to allow your printer to connect to your iPad or iPhone.

The rest is a breeze!

- Grab your iPad or iPhone and go into "settings."
- Make sure that wifi is turned on.
- Make sure that you're connected to the network that you just set up on the router.
- Select the printer and click on "print page."

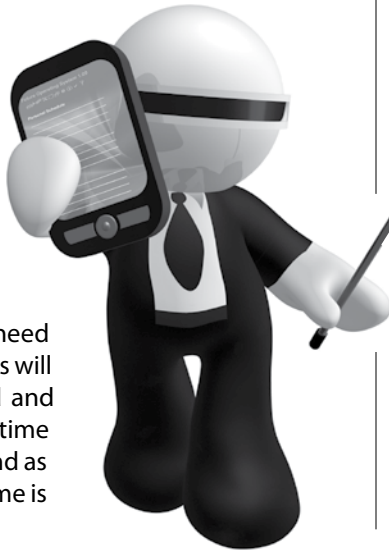
Continued on page 13

This works even without using the Internet.

If you want to make your set up more compact, I recommend taking a double sided stick pad, tape or Velcro and placing router on top or snugly in the back of your printer. Use same method to bind wiring on router and printer. This serves as a very efficient space saver and works extremely well.

Lastly, plug your printer into your power inverter and plug power inverter into your car.

Congratulations, you now have a mobile office capable of printing out or scanning documents at your fingertips! You will never again have to waste time going back to your office to pick up documents that need to be filed or served. Obviously this will allow you to remain in the field and complete more jobs! How much time do you think this will save you? And as we all know, money is time and time is money in this business!



I hope this article has been helpful and will serve to further the effectiveness of CALSPRO members and other process servers by use of 21st century wireless technology.

Below I have listed a few Youtube video links that are short but go more into detail in regards to set up and printing from your iPad or iPhone. 📱

www.youtube.com/watch?v=PttVK27qrhY&feature=fvwrrel
www.youtube.com/watch?v=nT49K574HT4&feature=related
www.youtube.com/watch?v=8_nPjFtlUE&feature=related
www.youtube.com/watch?v=VjjcE8AWccM

WWW.CALSPRO.ORG/BLOG/



What Is “Cloud Computing?”

DENNIS CHAPLES, WWW.TRISTARSOFTWARE.COM

What is cloud computing? Most often when hearing this phrase people come up with a variety of different ideas about its true meaning due to its complex nature. “The cloud” is used as a metaphor when referring to the Internet. An expansive interpretation of cloud computing is the belief that anything outside of a firewall is considered to be a part of “the cloud.” On the other hand vendors and analysts characterize cloud computing as virtual servers which are accessible on the Internet.

An easy way to understand the term cloud computing is to get to the root what an IT’s needs are. These include licenses for new software, training for personnel, boosting capacity, and additional



capabilities all of which are needed without creating a new infrastructure. Anything that can be paid per usage or uses a subscription on the Internet is under the umbrella term we call cloud computing. There are a variety of forms being used today. These different types of cloud computing are as listed: Software as a Service (SaaS), platform as a

service, managed service providers (MSP), utility computing, Internet integration, and service commerce platforms.

Cloud computing is beneficial to the Attorney Service industry because many helpful applications have been created by using “the cloud.” Software companies are building their applications to harness the cloud’s efficiency and Process Serving companies would be wise to take notes. Data Integration, .asp or (.asp .NET) websites, connecting multiple branches; all of these things work better and work faster in a cloud. Investing in cloud technology makes sense. Who wouldn’t want to take advantage of improved uptime, quicker access to data, safer server environment, built in redundancy, and application portability? 📱

Technology: Tips & Tricks

by Michael Kuhner
NAPPS Technology
Committee



Hi, my name is Michael Kuhner, a member of the NAPPS Technology Committee and owner of Direct Process Server located in Long Island, New York. I have been in the Process Serving industry for over 3 years now and wow has it been a fun ride so far. Technology, along with the benefit of being mentored by my lifelong friend Rob Dolan of S&R Services in California (a 15 year veteran of the profession) have been essential in getting me up and running with my business. I want to pay it forward to my fellow business owners; helping make their days more efficient and stress free using the Technology tools I have come to love and rely on. Each business owner can embrace Technology at their own rate, but each of my processes has helped me be more productive, which in turn means a more profitable bottom line. We are not looking to make Technology intimidating, rather simple tools to help you become more efficient and productive, working smarter not harder. One goal that we as a Committee embraced, was the concept of a "Tips & Tricks" article in each upcoming *Docket Sheet*. Here then, is the first realization of that goal!

One Technology tool that I use every day is something called E-Fax. When I first started my business I thought like many other people that it would be less expensive and simpler to just have a dedicated fax line with an All-In-One fax printer. Upon research I found the cost to be about \$30 month for the line, costly paper, toner and the other consumables required to run it;

well, that's when I saw the benefit of E-Fax. If you are like many servers, you may want to convert the paper your client just faxed you into a PDF to store for your records and/or send out to your server for service. With the E-fax product your client does the scanning for you! No more running out of paper or toner in the office printer, just a nice e-mail stating you received an electronic fax. Once opened, it is already in PDF format, easily saved to your computer, sent out to the field to the server or even sent to Staples or Kinkos for a server to pick up. The client will never again receive a busy signal with multiple faxes trying to get through. You'll also feel good knowing you've gone green and helped the environment by not printing pages you may never need.

This E-fax service is offered by many companies, but the company I use and have been happy with is called Maxemail. The plan I have is \$84 per year, for up to 250 incoming pages and 100 outbound pages per month. That is less than \$.03 a page for something that you may never have wanted printed in your office to begin with. Your unused pages for that month get banked for the future so it is not a use it or lose it fee. If you need more pages than that you can pay a \$.10 per page overage. For a better value, you can get additional fax numbers and they all pool together. You will receive a local number; or for an extra fee, you can get an 800 number. When the client sends you a fax, it comes in as an email with a PDF attached. When you want to fax out you can take a PDF and

simply upload it on to their site to send. Other companies have similar plans, so I highly encourage you to do some research and see what works best for you. Just a note, we do still have an all in one in our office for the occasional outgoing fax from a hard copy, with the caller I.D. set up to show our e-fax number.

Once you receive your first e-fax come, besides being giddy with delight from your new found e-tool, you will find you may not need all the pages sent. You may want to delete cover sheets or copies of client payments, or even add some pages such as field sheets and the like. This is where my next Technology tool comes in; a PDF editing program called PDF Factory. It is free to try and \$50 to buy. There are similar programs out there, but I have found this program to best suit the needs of my business.

The PDF Factory software shows in your computer just like a printer, so any program that prints can utilize this handy tool. It is very user friendly and a program that my office staff would mutiny over if I ever tried to delete. So now we have our first Maxmail and our PDF Factory installed and we want to get our documents out to the server. No problem! Just print the Maxmail to PDF Factory and feel free to remove any unwanted pages, add in field sheets or change the order from which they came in. You may not edit text

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President's Message – continued from page 1

working tirelessly to bring you an informative, interesting and engaging conference in context of embracing the huge attraction of Disneyland®. We have planned this conference to allow for “family together time,” and encourage you to bring your entire family to really enjoy the conference and Disneyland® parks. This is the perfect scenario for having the best attended conference in many years. It is a great opportunity to network with other legal support professionals and spend some

“face time” with those that you have known and spoken with over the years, but perhaps never actually met. The Board and I are very excited about this conference and we look forward to seeing you in Anaheim. 🐾



Technology: Tips & Tricks – continued from page 14

without using another program, but you can view as a PDF which tends to be easier on the eyes to read. Once you've got your ducks, um I mean docs, in order you can now save to your computer, print to your office printer or email straight from the program. This prevents lots of unwanted saved files that you don't necessarily need, as you've probably already saved the unedited fax before your changes went out to the server. Now let's just say it's Friday afternoon and you're more focused on your upcoming big weekend plans than the task at hand. You accidentally exited the program before saving or e-mailing and of course it's a rush service that needs to get out now! Good thing your new Technology tool has an auto-save feature that enables you to

retrieve what you were working on. Weekend saved! Another nice feature has to do with security. You can password protect the PDF file from being changed and or printed unless a password is entered.

These are just a few of the Technology tools that I have found to greatly help run my business more efficiently. If you have other tips or tricks that you would like to share with your fellow NAPPS members or questions on the items discussed in this article please e-mail me at Tech@DirectProcess.com or call me at 631-406-6989. You may also contact the Committee Chair, Eric Vennes at 855-356-0875 x 1008 or by e-mail at eric@pacificcig.com. Thank-you and happy serving! 🐾

2012 Bert Rosenthal Memorial Award

by Mark L. Schwartz, Rosenthal Committee Chair

The Rosenthal Committee meets yearly (ten of us met in June) and in a rigorous, sometimes emotional process, nominates those who it feels have given the utmost of service and dedication in promoting and protecting our industry. The committee consists of the current president, past presidents (who are still members) and all past recipients.

The first Bert Rosenthal Memorial Award was awarded to Bert himself, In Memoriam, in 1978. Bert was one of the founding members of CALSPro and as such, is represented by one of the thirteen diamonds in the Rosenthal pin that hopefully will be presented to one of the below nominees at this year's Conference.

I'd like to thank the members of the Rosenthal Committee for the distinct privilege of chairing this committee over the last two years. The new chairman will be last year's

recipient, Steve Janney. It will be his honor to carry on the tradition that was started 34 years ago.

Today it's my honor to present to you the Bert Rosenthal Memorial Award nominees, class of 2012. They are:

Mike Belote
Wendy Bowman
Brett Peters

I urge you to attend the Conference this year in Anaheim, where you'll be able to learn more about these exceptional human beings. There will be some biographies in the Conference workbook, and at the Saturday luncheon I'll be making a special presentation. At the banquet that same night, this year's recipient (if one) will be presented with the award. I hope to see you there! 🐾

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the new Rule 4 of the Federal Rules of Civil Procedure that the US Supreme Court had adopted that would allow Federal summons and complaints to be served by first class mail. It said in part:

"As of today, May 4th, there are only 83 days left to fight this legislation. At this moment, Bob Schroeder, Chairman of our Legislative Committee, and Leroy Lyon, one of our Legislative Advocates, are in Washington, D. C. exploring methods of preventing this Rule Change. Our Board of Directors authorized their travel expense at our meeting on May 1st. This travel alone was not in our budget for this year. Engaging the services of a Lobbyist in Washington will be expensive, and of course in not in our budget. At its May 1st meeting, the Board of Directors authorized Messrs. Schroeder and Lyon to expend up to \$50,000 in an all-out campaign to prevent this Rule Change from being adopted. It was suggested that each member be assessed an amount equal to twice his yearly dues in order to fund this campaign. CAPPs has successfully defeated mailing at the State level many times in past years. Now it is time to take on the Congress of the United States!"

There is a second letter from Dick Green dated June 15, 1982 addressed to "Dear Process Servers." It contains a list of the companies and individuals that had contributed money to fight Rule 4. It shows that 78% of the money came from California. Among the people who had contributed, the list includes 6 people that are in this room: Steve Janney, Tony Klein, And Estin, Joe Karotkin, Jerry Topolos, and Tom Bowman.

In the NAPPs history, you will also find the Minutes of the formation meeting of NAPPs. It was held at a CAPPs annual meeting, but there were people present from 10 other states as well. Per those Minutes:

A meeting of interested persons was held concerning the formation of a national association on October 10, 1982 at Las Vegas, Nevada. Mr. Thomas Bowman explained briefly the purposes of a national association. He stated ten states outside of the State of California are represented here today.

Mr. Ezell stated California has compiled a lot of extremely valuable information on which no dollar value can be placed and for everyone present to be able to take advantage of that is a great thing.

Mr. MacDonald said we cannot talk long enough about the merits of a national association, the questions are, how do we form it, raise the money, and go about it? The Arizona association is only three years old.

Mr. Sroka said that the chances of starting up an association in New York would be way far into the future, if at all.

Mr. Blum said he feels we would need to have a national roster."

There are also the minutes of the first meeting of the Executive Committee the next day that read:

President Estin went on to say that he would like to hear how everyone feels about either NAPPs taking over the Federal Project at this time or should it be left in the hands of CAPPs.

Mr. Hughes stated there is so much to be done to get NAPPs off the ground that it is his feeling we would not want to jeopardize the Project at this time by changing gears and it would best be left within the purvey of CAPPs.

Mr. Herren stated he wholeheartedly agrees with Mr. Hughes. Mr. Herren said he believes the Federal Project should be left with the CAPPs leadership as they have done such a tremendous job.

The donations to CAPPs by NAPPs of funds to help in the Federal Project was discussed. Mr. Estin stated CAPPs financial position at this time on the Federal Project is that all money we have collected has been spent.

President Estin said he thought a suggestion that a donation to CAPPs from NAPPs on the Federal Project was in order. President Estin then asked the other committee members if NAPPs should send \$1,000 to CAPPs. They all agreed this should be done. President Estin then directed that Treasurer Hein send \$1,000.00 to CAPPs as soon as the NAPPs account is open and ready to go.

President Estin appointed Steve Janney and Bud Herren to write a position paper on the pros and cons of state charters,

President Estin stated we must have a newsletter to let all the members know what is happening. He appointed Fred Blum as the Editor."

As Paul Harvey used to say, "And now you know the rest of the story."

There are seven people present who were members of CAPPs in 1982. I would like the following people to come forward: Jerry Topolos, Joe Karotkin, Tom Bowman, Tony Klein, Michelle Dawn, Steve Janney, and myself.

For being the first state association and setting an example for all the other states, for defeating Rule 4, and for forming NAPPs, I am proud and honored to announce the 2012 recipient of the Donald C. "Mac" MacDonald award is: the CALIFORNIA ASSOCIATION OF LEGAL SUPPORT PROFESSIONALS 🇺🇸



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