



CALSPRO PRESS

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

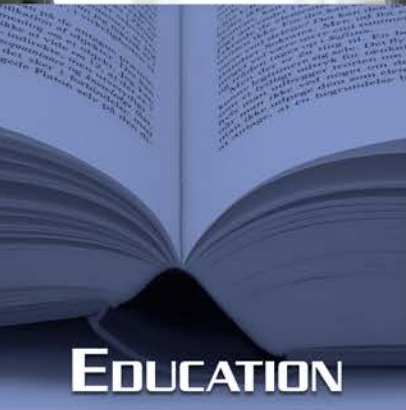
Volume 6 / Issue 3 / Fall 2013



LEGISLATION



MEMBERSHIP



EDUCATION



CONFERENCE



CALSPRO

CALIFORNIA ASSOCIATION OF
LEGAL SUPPORT PROFESSIONALS

45TH CONFERENCE

Harrah's Lake Tahoe Resort, South Lake Tahoe
— October 4-6, 2013 —



What's Now?
What's Next?





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CALENDAR Of Events...

2013 CONFERENCE

October 4-6, 2013

Harrah's Tahoe

THANK YOU Advertisers

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PRESIDENT'S MESSAGE

MICHAEL KERN

2013 CALSPRO PRESIDENT

This year has been quite rewarding for me as I have acclimated in serving as your President. I feel that I have made so many new friends and really strengthened the bond with existing ones more than ever before. Your thoughts, questions, concerns, comments and suggestions have shown me that you, as members, really care about our profession and this association. I am truly honored to be of service to you.

Our executive committee, Wendy Bowman, Cliff Jacobs, Brett Peters and myself have worked tirelessly throughout this year, along with our fellow board of directors, committee chairs, legislative advocate, Mike Belote and our administrative staff. We are all strongly committed to providing the best possible service to you, our members.

We are presently gearing up for the conference where we fully intend to have a balance of association business and

Tahoe fun. To get things started right, on Friday morning golfers, can participate in our annual Jack C. Janney Memorial Golf Tournament. Later that evening, non-golfers can join us at the Friday night "Bowl-a-Rama" event which is sure to be a great social event and loads of fun.

The conference theme this year takes electronic service right to the forefront. As technology thrusts us forward, we fully intend to address what is needed to remain relevant and to thrive. We have arranged for a dynamic group of experts to educate and engage us in this conversation. Your voice will be especially important at conference this year, as we outline CALSPRO's priorities over the next few years and beyond. Your vote will help select the leadership that will get us there.

After the business and elections, I look forward to seeing you at the cocktail party before the banquet where we can mingle, network and even place bids on some great

silent auction items generously donated by many of you. We are also grateful to all of our sponsors, vendors, administrators and you, the member, without whom our great conferences could not be possible.

While attending conference I know you will take advantage of all the amenities that Lake Tahoe has to offer, like the shows, clubs, games, and lake activities. October can't come soon enough, and I look forward to seeing you there. 🍷

CALSPRO 45TH CONFERENCE

October 4-6, 2013

Harrah's in South Lake Tahoe



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CAPITOL REPORT

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



Final Stretch

It may only be August on the calendar, but in “legislative time” the year is almost over. The California Assembly and Senate are in the final four weeks of the legislative year, in preparation for the fall recess beginning on September 14, 2013. Then, the citizenry is safe until Monday, January 6, 2014.

Big issues may be decided in the final weeks of the session in August and September. Such high-profile issues as minimum wage, unemployment insurance, reform of the California Environmental Quality Act, reform of “Proposition 65” (the source of the warnings on buildings and products which begins “This building contains chemicals known to the state to cause..”), and potential changes in the limits on medical malpractice actions will likely be debated in the final four weeks.

All told, nearly 1100 bills remain alive for consideration this year. Typically, 800-900 will be forwarded to the Governor for signature or veto. This governor has been particularly vocal that too many bills are being passed, so a considerable veto percentage is possible.

CALSPRO members are invited to view the list of bills of interest to the association, available through the website. A variety of issues relevant to attorney services and photocopiers were introduced this year, including earnings withholding orders,

writs and electronic court records, trespass, stalking and privacy, HIPAA conformity, recording fee surcharges to build low-income housing, renewals of judgments, and more.

A very key bill debated during the year related to charges for photocopying medical records. SB 588 (Emmerson) is sponsored by companies providing copies pursuant to contracts with health care providers. CALSPRO engaged in extensive discussions with the sponsors, and SB 588 has been made into a two-year bill, meaning that it will not be enacted this year. It is likely that further discussions will occur over the fall, to see if common ground can be identified.

Additionally, of course, court budgets have been a major area of concern this year. The final state budget provided a modest increase of \$63 million to the judicial branch, which is good news, but not enough to stave off further layoffs in some counties. It is possible that courts may allocate some of their increased funding to increase counter hours, a welcome change. With the state revenue picture improving, the hope is that future years will begin to restore the devastating cuts visited upon the judicial branch, so that access to justice is not further jeopardized.

The good news is that no “stop the press” negative bills were introduced

this year. Given the short time remaining in the legislative session, such negative legislation is unlikely, but vigilance is necessary, as bills can be amended right up until September 13 which might affect CALSPRO members.

Longer term, however, it will be necessary to thoughtfully confront the implications of electronic filing and service. This critical subject will be a major component of the fall CALSPRO Conference in Lake Tahoe, and is virtually certain to be the subject of legislative proposals in the foreseeable future.

For now, CALSPRO will be monitoring the remainder of the legislative year. Governor Brown will have 30 days following the end of session to sign or veto the bills forwarded to him, so most results will be known by the Lake Tahoe event. Join us! 🐾



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Remaining Relevant in the Digital Age

Mark Schwartz, eService Ad Hoc Committee Chairman

I've been a member of CALSPro since 1989 and I've seen a lot of change. From handwritten dockets, when I was a court runner, to Thomas Bros. map books as a server, to the first "portable" cellphone (think car battery for those too young to remember), to fax filing, to eFiling and now, eService. Okay, I realize that eService has been around for quite some time but it's only recently that it has started to gain some traction in the law firm world. I've taught, and teach today, courses that go into some detail about how process is being served today via social media (think modern publication), fax or email; in some instances, without the legal authority necessary (i.e. service of subpoenas by email is not per the CA statutes). And, on June 28th, the Judicial Council of California amended Ca. Rule of Court 2.251 (c) (2) to require eService in cases where eFiling is mandated, "except when personal service is otherwise required by statute or rule..."

It's because of what I perceive to be a sea change in our industry, or profession if you wish, that in December of last year, the Board approved a motion to organize a full day discussion to begin to formulate a plan as to how we are going to address electronic filing and service. Well fellow member, phase 1, have the "one-half day" discussion, is complete. We (the newly formed eService Committee, consisting of all officers, board members and committee chairs as well as Tom Bowman, Andy Estin, Jeff Karotkin and David Nill met on June 14th in Sacramento.

The purpose of the meeting was not to make decisions, but instead recommendations, and continue discussions as we move towards the Conference. And while eFiling is important to understand the big picture perhaps, we believe that the focus here should be about eService. eFiling rules are for the most part already in place and it's really technology that drives that

bus, if you will. eService, on the other hand, is already occurring, even though in many cases, it is not codified. How do we ensure that it's our members that serve those, as well as other papers?

June 14th was a remarkable day. We had honest and open discussions about where we were going, where we could be going and where we wanted to be going. Again, we came away with more questions than answers. However, all of us in the room felt better that all of us were in the room. Sounds like a Yogi Berra-ism, doesn't it? In all seriousness, eFiling and eService are not going away! It's vital that we figure out, AS AN ASSOCIATION, how we can remain relevant in this daunting, and at the same time what I feel is exciting, technology age.

Continued on page 7



MEMBERSHIP UPDATE

by **Larry Kirlin**

Membership Committee Chairman

"THE MEMBER EXPERIENCE"

I recently reviewed a presentation by Tom Morrison, a veteran in the trade association management field. Tom was talking to his audience about the Member Experience "WOW Factor". In other words, how can your members get the most out of their membership.

You are spending a lot of money to attend Annual Conference. Shouldn't you try and get the most bang for your buck? Tom gives us some ideas to make your conference experience a business success.

Attend conference with a purpose. Each day at conference he suggests that you write down:

- One idea or new way to improve something you are already doing.
- Something you are going to do differently on Monday morning.
- One new connection you made who can help you make change.

Associations exist for the mutual benefit of the members. They allow members to organize themselves into functional groups. These groups harness the energy of the members to accomplish tasks that

individuals can't do on their own. They allow financial resources to be pooled and ideas to be developed into action plans.

As we approach conference, our association is pondering the effects of technology on the future of our industry. The impact of eFiling and eService on our industry will be epic. Even the largest and strongest companies are coming together to discuss the future. No company, small or large should stand on the sidelines watching passively. Get involved. Come to conference. Define your future! 🦋

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Okay, so now on to the next phase, or phases. This is where you come in fellow member:

1. A survey has been sent out in order to solicit your opinion(s). Please be on the look out for it and please take the time to answer it openly and honestly. Tell us what you think and fear. Most importantly, tell us what you want, or need, to know.
2. The Conference Committee (Stephanie Saylor, Chair) has been hard at work on the conference agenda, and is finalizing, along with the eService Committee, an informative and eye-opening, conference agenda so we can all dive into this thing as a group in October.

- a. That agenda currently includes: Background on eFiling & eService infrastructure, rules, statutes, a presentation from a colleague from Canada whose organization has experienced similar issues and came up with a solution that works for them; and a "town hall meeting" so we can all "hash things out."
- b. We've also included some time Sunday morning so after it all sinks in a bit, we can go at it again.

The conference agenda is now available on the website; please, make plans to attend the Conference. Everyone's voice needs to be heard and the more minds focused on this subject, the better! And, please email me at mschwartz@onelegal.com if you have any thoughts you'd like to share. ☺

Vendor Spotlight



In this issue we are shining some light on one of our newest Vendor Members, ISD Corporation and their eFiling portal solution. ISD will be joining us at Conference, so be sure to stop by and speak with the ISD team.

Electronic Filing Solution by ISD Powered by <xmlLegal>

ISD Corporation is your Electronic Filing Solution! We all know Electronic Filing is here to stay and is expanding rapidly. Our solution not only integrates this new technology into your existing business model, but also provides the platform for you to expand into new market areas.

Concentrate on what you do best and leave the details of electronic filing to us! ISD's Electronic Filing Solution is designed to provide the technology framework to enable you to integrate our products into your current offerings as well as offer additional services and filing locations.

The ISD Solution provides the following:

- Custom public electronic filing portal branded with your logo and colors
- Support for multiple Superior Courts so that you can expand your services into other jurisdictions
- Electronic Filing and eService
- Automatic ACH funds transfer to keep filing transaction costs to a minimum
- Integrated with popular products such as TriStar, Proserve and CXT Software
- Cost effective through special CALSPro contract and pricing
- Serving Orange County now and Riverside County starting in October 2013. San Mateo, Contra Costa and others will be coming in 2014.

ISD is a CALSPro member serving other CALSPro businesses. Our business model is designed to serve you so you can focus on serving your customers. ISD's help desk and accounting group are available to support you. Please stop by our table in South Lake Tahoe for a demonstration and detailed information. Talk to any of our clients to see why they selected the Solution by ISD Powered by <xmlLegal>. ☺

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45th CALSPro Conference at South Lake Tahoe

by Stephanie Saylor, 2013 Conference Chairperson

EService? Should you be concerned? The answer is "Yes"; and so much so, that we will devote the entire Conference to this one subject. This is a game changer. Please plan to attend Conference in October to hear more about how eService is being used today and how it may affect your business. This is your opportunity, and may I dare say your responsibility, to become educated on eService and help shape our future.

How will your attendance at Conference make a difference? The voice of the membership at Conference will guide and strongly affect the course of our legislative program relating to the electronic service of documents. During Conference you will learn the latest developments and trends relating to eService and be given time to ask questions, voice your concerns and hear from your fellow members on this important topic.

CALSPro is your association and we need your input and direction. The legal support profession has come to a fork in the road and there are varying schools of thought on this topic. Is there a route that leads to prosperity? Is there a route that leads to the demise of our profession? The time is now to hear from those who are knowledgeable in this field and to become educated. Come to conference, hear the various presentations, participate in the discussion and decide for yourself where your heart lies.

Conference is also the time to elect your Board of Directors. Perhaps you will choose to run for a seat yourself? You are given this opportunity at Conference and at no other time during the year. This is our opportunity to impact the future of our Association. Attend Conference, cast your vote and help navigate the course for CALSPro. Watch for information coming your way in the weeks ahead. The CALSPro Press has a number of articles relating to this topic. Updates will also be sent via

our website, Facebook, Twitter and email. Additionally, you will be receiving a survey relating to eService. Please take a few moments and respond. This feedback is very important to us.

This year's conference is at Harrah's in beautiful Lake Tahoe. And while we have important matters to work through on Saturday, we do plan to carve out some time for fun. We have a great Friday night planned at the Tahoe Bowl. Come out to see old friends, network and partake in a little friendly sportsmanship! Our annual business meeting starts promptly at 8:00 A.M. Saturday morning. After a full day, we will conclude with our banquet, installation and awards ceremony Saturday evening. We wrap up conference activities Sunday

morning with an eService Committee meeting, so please plan to be there as we work on the agenda for the months to come. By noon, the day is yours to enjoy the great Tahoe outdoors. Be a part of the discussion and plan for the future. **Join us at Conference!** 🐾

Congratulations to our 2013 Bert Rosenthal Memorial Award Nominees

**Chad Barger
Jennifer Blevins
Wendy Bowman
Cliff Jacobs
John Perez
Brett Peters**





CALSPRO

CALIFORNIA ASSOCIATION OF
LEGAL SUPPORT PROFESSIONALS

45TH CONFERENCE

Harrah's Lake Tahoe Resort, South Lake Tahoe
— October 4-6, 2013 —

Harrah's Lake Tahoe Resort, Lake Tahoe, NV

15 U.S. 50 at Stateline, Stateline, South Lake Tahoe, Nevada
800.455.4770 • 775.588.6611
www.harrahslaketahoe.com

Room Rates: \$119.00 for Standard Room Friday and Saturday.
\$79⁰⁰ for Thursday plus taxes. Cut-off Date: **Tuesday, September 3, 2013.** Please contact the hotel directly at 800.455.4770 and ask for the CALSPRO rate. Please refer to group code: **S10CLS3.**

Conference Details

All registrations must be returned with payment and postmarked by September 9, 2013 to avoid higher registration fees.

Cancellation Policy

Cancellations must be made in writing and received by September 09, 2013. Cancellations will be subject to a fee of \$50⁰⁰ per person. No refunds will be allowed for cancellations received after September 9th.



ATTENTION SHOPPERS

We are in need of Silent Auction items! Please consider making a contribution to this year's Silent Auction at Conference. Once you've made a purchase, please send details to Stephanie Shoen at stephanie@caladmanagement.com.



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Guest Speaker Ray Louis Maranda



Mr. Maranda has been the President and General Manager of the Quebec Chamber of Bailiffs since 2007, a professional organization. He is also a member to the Chartered Administrator, a professional organization, and secretary of the International Union of Judicial Officers, a worldwide organization. Mr. Maranda is a Delegate for North America for the National Trusted Third Parties Association, and he is the founder of Huissier Quebec.

Mr. Maranda is very involved in developing measures for IT and the utilization of technology in the court system. He helped create "Nota Bene" a secured platform for the electronic service of process. He is also involved with several committees relating to access to the judicial system.

Local Attractions

Please visit:
www.vistinglaketahoe.com or www.tahoesouth.com
for more information.





CALSPRO

CALIFORNIA ASSOCIATION OF
LEGAL SUPPORT PROFESSIONALS

45TH CONFERENCE

Harrah's Lake Tahoe Resort, South Lake Tahoe
— October 4-6, 2013 —

SPONSORSHIP OPPORTUNITIES

We have MANY sponsorship opportunities at the upcoming CALSPRO Conference. Check it out!

Please mark the appropriate category you have chosen and return this document along with payment to CALSPRO, 2520 Venture Oaks Way Suite 150, Sacramento, CA 95833 • 916.239.4065 • 916.924.7323/fax • www.calspro.org • 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 *CALSPRO 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 *CALSPRO 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 *CALSPRO Press*, 2 complimentary tickets to luncheon and banquet.

EVENT SPONSORSHIP AND EXHIBITS:

Please check ☒ your preference(s):

☐ **Friday Evening Food at CALSPRO Bowling Event \$350 (3 available)**

☐ **Silent Auction Donation - Please list amount/Item: \$_____**

☐ **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 Hot Breakfast Buffet – \$500 (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: _____

Phone: _____

Address: _____

City, State, Zip: _____

E-Mail: _____

Fax: _____

So that your company name can be included in the necessary conference materials, the deadline for sponsorship submission is September 09, 2013. After this date, sponsorship opportunities may still be available, however, your company name may not be listed in some conference materials. Company logos should be e-mailed to: stephanie@camgmt.com.

Checks made payable to CALSPRO (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 _____

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City _____ State _____ ZIP _____

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Signature of Card Holder _____

Updates and Conference information will be available on the CALSPRO website (above), so please make sure you visit the site often.

Thank you to all the CALSPRO 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 Tahoe!** •



CALSPRO

CALIFORNIA ASSOCIATION OF
LEGAL SUPPORT PROFESSIONALS

45TH CONFERENCE

Harrah's Lake Tahoe Resort, South Lake Tahoe
— October 4-6, 2013 —

CONFERENCE SCHEDULE

FRIDAY, OCTOBER 4, 2013

8:28 Shotgun Start
17th Annual CALSPRO Jack C. Janney Memorial Golf
Tournament – Lake Tahoe Golf Course

4:00 pm – 5:30 pm
Board of Directors Meeting

5:30 pm – 7:30 pm
Registration Open / Exhibitor Set-up

6:30 pm – 6:45 pm
Bus Transfers to Tahoe Bowl
(Sponsored by Rezac-Meyer Attorney Service Los Angeles)

7:30 pm – 9:30 pm
CALSPRO Bowling Event, South Lake Tahoe



**Enjoy some ten pin action Friday
night on your CALSPRO reserved
bowling lanes!**

In addition Tahoe Bowl has billiards, arcade games and the Lane 17 Sports Bar with large flat screen TV's. Relax, have fun, enjoy the food & spirits and challenge your fellow members to a few good games!

SATURDAY, OCTOBER 5, 2013

7:30 am – 5:00 pm
Registration and Exhibits Open

7:30 am – 8:30 am
Continental Breakfast in Exhibit Area

8:00 am – 9:30 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.

9:30 am – 10:00 am
Exhibitor Break and Exhibitor Presentations

10:00 am – 10:15 am
eSERVICE SESSION #1
"Introduction and Background"
• *Mark Schwartz, Chairman, CALSPRO eService Committee*

10:15 am – 11:00 am
eSERVICE SESSION #2
"Infrastructure"
During this session, Jeff Karotkin will provide a behind the scenes look at the systems and integration that make eFiling and eService function in California.
• *Jeff Karotkin, CALSPRO eService Committee*

11:00 am – 12:00 noon
eSERVICE SESSION #3
"Experience with eService"
Louis-Raymond Maranda, is President of the Chambre des hussiers de justice de Quebec, the professional order for Quebec's 400 plus bailiffs. Ray will share his experiences regarding Nota Bene, a platform "that is secure and operated by a trusted third-party," and used in Quebec to provide notice (i.e. service) electronically.
• *Ray Maranda, Quebec Bailiff's Association*



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45TH CONFERENCE

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CONFERENCE SCHEDULE

SATURDAY, OCTOBER 5, 2013

12:00 noon – 1:15 pm

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

1:15 pm – 1:45 pm

eSERVICE SESSION #4

"Current Rules and Statutes"

Mark has presented hundreds of law related workshops to process servers, attorneys, paralegals and legal secretaries over his 35 plus years in the industry. He will bring us up-to-speed on current rules and statutes related to electronic service.

• *Mark Schwartz, Chairman, CALSPRO eService Committee*

1:45 pm – 3:00 pm

TOWN HALL MEETING

eService Q & A and Discussion

Join the speakers, members of the eService committee, and your fellow members as we all discuss the impact electronic service is currently having on our profession and what impact it could have in the future.

3:00 pm – 3:15 pm

Exhibit Break

3:15 pm – 5:00 pm

Annual Business Meeting (continued)

Nominations, Elections and Committee Reports

5:00 pm

Meeting of the new Board of Directors

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 / Exhibitor Prize Drawings /
Passport Card Drawing**

SUNDAY, OCTOBER 6, 2013

7:30 am – 8:45 am

CCPS Review and Exam

7:30 am – 9:45 am

Registration and Exhibits Open

8:15 am – 9:45 am

Hot Breakfast Buffet with Family and Friends

9:30 am – 10:30 am

"eSERVICE COMMITTEE MEETING – WHAT'S NEXT?"

All registrants are welcome to attend.

Join members of the eService committee as we further the discussion and begin formulating a plan as to how we as an industry can continue to remain relevant in the digital age.

10:30 am

CONFERENCE ADJOURNS

THANK YOU FOR ATTENDING



CONFERENCE



CALSPRO

CALIFORNIA ASSOCIATION OF
LEGAL SUPPORT PROFESSIONALS

45TH CONFERENCE

Harrah's Lake Tahoe Resort, South Lake Tahoe
— October 4-6, 2013 —

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

☐ \$225 ☐ Late Registration \$275*

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

Full Registration – Non-member

☐ \$325 ☐ Late Registration \$375*

Non Member Guest

- ☐ All events \$175
- ☐ Saturday Lunch Only \$55
- ☐ Saturday Banquet Only \$65
- ☐ Sunday Hot Breakfast Only \$35

Golf Tournament

☐ \$125

CCPS Exam

- ☐ \$10 (Individual Member)
- ☐ \$15 (Company Member)
- ☐ \$30 (Non-member)

Total: \$ _____

Attendee Name:

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

Full Registration – Member

☐ \$225 ☐ Late Registration \$275*

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

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Golf Tournament

☐ \$125

CCPS Exam

- ☐ \$10 (Individual Member)
- ☐ \$15 (Company Member)
- ☐ \$30 (Non-member)

Total: \$ _____

* Registration must be postmarked by September 9th to avoid additional fees.

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. **Credit card forms must be faxed, not emailed please.**



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(916) 924-7323



VIA MAIL:
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CALSPRO

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45TH CONFERENCE

Harrah's Lake Tahoe Resort, South Lake Tahoe
— October 4-6, 2013 —

EXHIBITOR REGISTRATION

Company: _____

Address: _____

City, State, Zip: _____

Phone: _____ **Fax:** _____

E-Mail: _____ **Website:** _____

Attendee Name: _____

Exhibit Information

Friday, October 4, 2013

5:00 p.m. Exhibit Set-Up

Saturday, October 5, 2013

7:30 am – 5:00 pm Registration Open

7:30 am – 5:00 pm Exhibits Open

9:30 am – 10:00 am Exhibit presentations

12:00 noon – 1:15 pm Lunch

6:30 pm Reception and Installation Banquet

(optional & additional charge)

Sunday, October 6, 2013

7:30 am – 10:30 am Exhibits Open/Hot Breakfast Buffet

9:45 am – Exhibitor tear down

**Type of product/service
that will be exhibited:** _____

Important – Please note: security will not be provided.

☐ **Member** - \$350.00 ☐ **Non Member** - \$475.00

☐ **Electricity** ☐ **Internet Access** (additional charge required)

☐ **Other:** _____

Extra Tickets

_____ Tickets for Saturday Night Banquet @65⁰⁰ each. \$ _____
Total: \$ _____

Method of Payment

☐ Enclosed Check # _____ for \$ _____

☐ Charge \$ _____ to my ☐ Visa ☐ MasterCard ☐ AmEx

Name of Card Holder _____

Company Name on Card _____

Billing Address _____

City _____ State _____ ZIP _____

Cancellation must be in writing and received no later than 8/23/13. A \$75⁰⁰ cancellation fee will apply.

If you have any questions, do not hesitate to contact:

Stephanie Schoen, CALSPRO Central Office 916.239.4065. Please do not e-mail contract.



TECHNOLOGY COMMITTEE REPORT

by Kraig Vorsatz, Technology Committee Chairman

UTILIZING TECHNOLOGY AS A LEGAL SUPPORT PROFESSIONAL

Technology has had a positive impact in our legal support profession recently and its advancements are allowing us to conduct business more efficiently. The following are some of the ways we've been able to utilize these newer technologies:

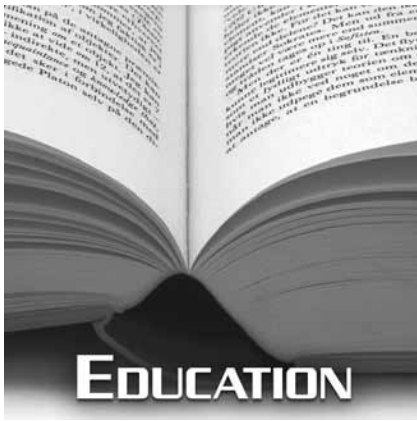
- GPS has replaced map books and has allowed us to get to addresses and locations easier and also tells us exactly where we are going now.
- GPS tracking is being used more regularly now and has been integrated with many Serve Managers. This allows servers to verify locations at specific times for lawyers and GPS tracking is now being required and becoming mandatory from some law firms to handle their work. This allows attorneys to follow their serves and know exactly when their documents are being attempted and that cases are being managed to their expectations. This has also allowed process servers undeniable evidence of when they were at a location or when service was made.
- Smart Phones have allowed servers to update databases from the field, take pictures of documents (i.e. posting eviction notices), allows for conformed face pages to be returned to their offices or clients immediately after filing via email. Now these phones have literally become mobile computers and field locates can be accomplished directly by process servers in the field. Servers can receive jobs via email anywhere

now. These portable devices have also allowed the communication of objections from clerks back to law firms and clients immediately allowing minor problems to be corrected right away. In regards to court research and copy work smart phones help facilitate jobs easier between the courthouse and clients in respect to exactly what copies are wanted from the court case file ensuring that all documents are obtained without another visit.

- Portable printer, scanner, copier, and fax machines have been implemented by many servers and court runners and are being operated inside their vehicles. This has made the forwarding of last minute assignments to servers easier and has allowed them to also receive them in remote areas too. We can now receive, scan and email complete documents immediately for filing while parked directly in front of the court house. This has saved a tremendous amount of time, money, and energy for our profession and has empowered many of us to become completely mobile.
- Cameras and audio recording devices have allowed us an opportunity to document, verify, and confirm many things involving our legal support profession. We can take pictures of people, cars, homes, notices, face pages, and send them all electronically anywhere we would like. There are camera pens that can record interactions between servers and subjects. The

service of TRO's, Evictions, and Family Law papers have an escalated potential for danger for process servers and recording these exchanges is worth consideration. Should a problem arise the server can have exact evidence of what transpired and may be able to effectively help law enforcement prosecute anyone who attempted to bring harm to the server and may assist in resolving any situations that might come about with greater ease and believability. In the event of something bad happening, most servers are alone when serving papers and with no witnesses readily available this is a viable tool to help protect their rights and verify the truth of any incident that arises from serving process. We strongly suggest checking with local law enforcement agencies to make sure that the use of any of these recording devices is not legally prohibited in your area.

- License Plate Recognition (LPR) has been in use by law enforcement and a version of its use is now becoming available to us, although the police are receiving real time-data this version lags behind and the information is usually 48-72 hours old. LPR provides valuable information for locating subjects and the movement of their vehicles by capturing pictures, locations, dates, and times. We look forward to the day when this data may be available to our profession in real time too.



CONTINUING EDUCATION REPORT

by *Clifford Jacobs*

Education Committee Chairman

GETTING READY FOR CONFERENCE

Our profession has advanced by leaps and bounds, especially over the past decade in respect to utilization of electronics and technology. What were once time consuming tasks like looking up addresses on a map, typing out proofs of service, mailing out proofs for signature, and calling every client with a status report have been streamlined and optimized via GPS, form filling software, emailing proofs for signature, and auto-reporting features that alert your clients when you update status in your system. It has been said that technology waits for no one, and that it is better to understand and embrace it rather than burying your head in the sand or opposing it. In this light I would like to offer some references for you to further your knowledge and understanding of eService, the main focus of our annual conference in October. I would first like to clarify that the type of eService we will be focusing on is the electronic service of primary documents that establish jurisdiction, such as a Summons and Complaint. This is an important distinction and clearly separate from parties opting-in or otherwise stipulating to be served electronically with secondary documents, such as Motions, Replies or Oppositions. As you study the concepts, Rules and Codes, you may have questions relating to the topic of electronic service in the broad sense, and I expect that there will be discussion on all fronts. However, because we have so much ground to cover and limited time to do so, we plan to keep a focus on primary service as much as possible.

Study Points:

- The Judicial Council's action on June 28th, 2013 (effective July 1, 2013) of amending **CA Rule of Court 2.251 (c)(2)** which generally mandates eService in cases where eFiling is mandated makes our conversation of eService that much more timely and relevant.
- Prompted by the passing of **AB 2073**, which was introduced as an act to amend CCP 1010.6 (approved by the Governor September 14, 2012) the June 28th action by the Judicial Council moves California closer to the requirement of adopting uniform rules to permit mandatory electronic filing and service of documents in specified civil filings on or before July 1, 2014.

- **CA Rules of Court 2.250 through 2.261**, with added focus on **Rules 2.250 (b)(2-5) and Rule 2.251 Electronic Service**, will provide you with a strong knowledge base to not only understand the discussions at conference on a meaningful level, but will equip you with the fundamentals and background to help propel the conversation forward in a meaningful way.

The more knowledgeable you are prior to our conference, the more you will be able to glean from, and add to the conversations. It is my hope that we engage in this conversation productively, taking an active role in deciding what direction our Association will head, and perhaps distinguishing what will become best practices in our profession. 🐼



WWW.CALSPRO.ORG/BLOG/

by Robert Porambo

Advertising Committee Chairman

We've had a productive first half of 2013. We're ready to release our long awaited job post program on our website and conference will be here before you know it. If you want to increase your exposure, upgrade your CALSPro listing. Keep in mind all CALSPro advertising dollars stay in CALSPro and help support our industry.

I have a new lead on a cell phone provider. The company is called Solavei and they have a very unique approach and flat rate pricing (who wants to save money) They should be joining CALSPRO in the near future and plan on attending conference in Tahoe.

If anyone knows of a company that handles auto repairs/tire sales please let me know. I've been trying to get several of the larger auto shops (Pep Boys, Firestone) to contact me to no avail.

Thank you for allowing me to serve our association and I'll see you in October. 🐾

Robert Porambo

rporambo@knoxservices.com

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