

Volume 9 / Issue 1 / Spring 2016



LEGISLATION

Legislation:

Highlights of Our History



MEMBERSHIP

Membership:

Member Benefits and Value



EDUCATION

Education:

A Worthwhile Investment



CONFERENCE

Conference:

October 7th - 9th, 2016

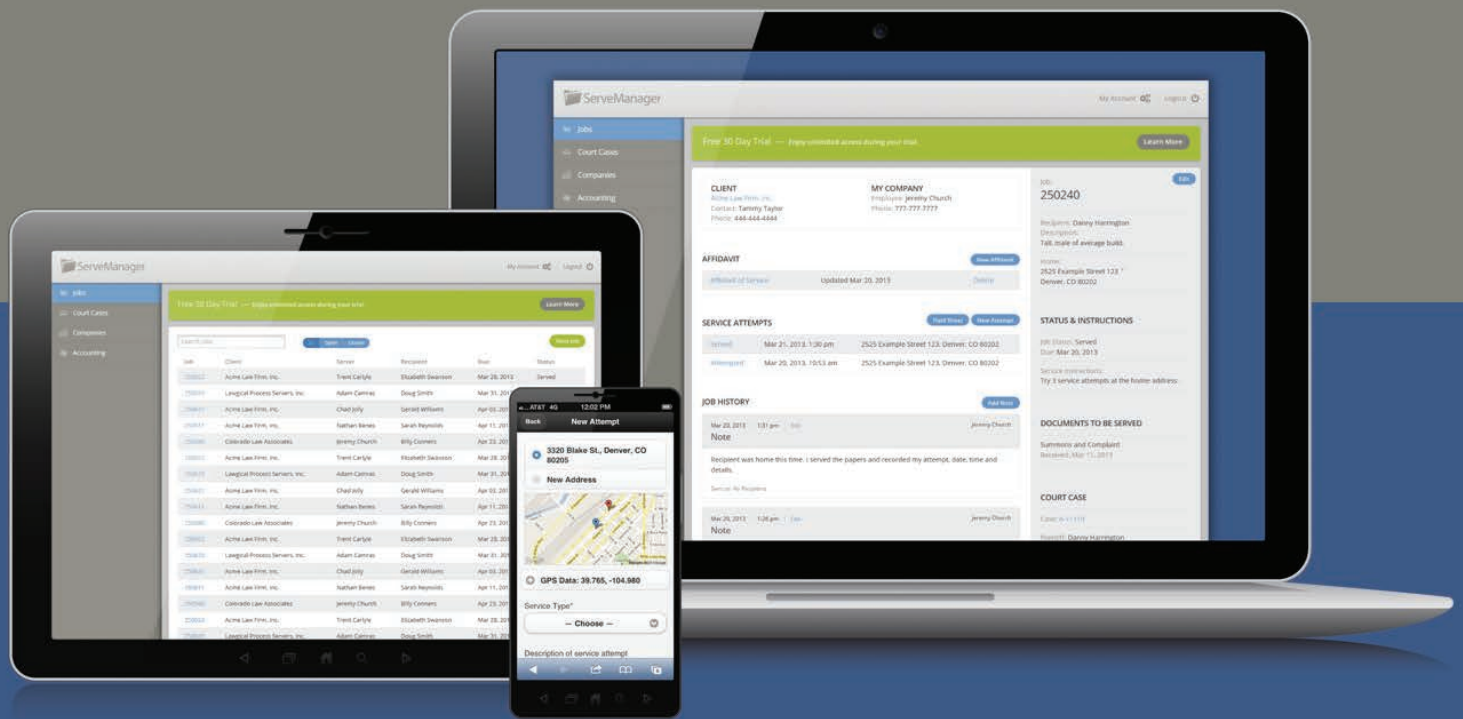
San Francisco Airport Marriott Waterfront



Association members get

\$50off
new subscriptions

Plus, we'll donate
\$50 to CALSPro



Activate your promotion and see full details here:
www.servemanager.com/pages/calspro

Or, call us at (800) 280-4400

✓ Invite clients, and share jobs.

✓ Save companies and contacts.

✓ Email attempts and affidavits.

✓ Print or email invoices.

 **ServeManager**
A ServeNow Company



INSIDE THIS ISSUE

2 President's Message

3 Capitol Report

4 CALSPRO Legislative History by the Decade

7 Membership Update

9 Coalition for Improving Court Access Update II

13 Meet the CALSPRO Board Members

17 2016 CALSPRO Continuing Education Schedule



Thank you to our Advertisers

ServeNow – Inside Front Cover

1-800-Process – 10

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

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.

© Copyright 2016, California Association of Legal Support Professionals. No material may be reproduced without the express written consent of the publisher. Controlled circulation postage paid in Sacramento, CA.

California Association of Legal Support Professionals

2520 Venture Oaks Way, Suite 150
Sacramento, California 95833

Phone: (916) 239-4065 • Fax: (916) 924-7323

Web site: www.calspro.org

E-mail: info@calspro.org



FIND US ON
FACEBOOK AND
TWITTER!



PRESIDENT'S MESSAGE

CLIFF JACOBS

2016 CALSPRO PRESIDENT

For nearly half a century our association has remained at the forefront of protecting, promoting and preserving our profession, ensuring due process rights of all parties and championing fair and equal access to the courts. Our Mission directly correlates to this. Along the way CALSPRO has fought adverse legislation and has put forth beneficial legislation preserving the tenets of due process along the way. Registered Process Servers (RPS) are granted Assault and Battery protection under the same statutes that cover Police, Fire Fighters and EMT's; have been given special statutory authority to serve Writs of Attachment and Execution, Pre-Judgment Claim of Right to Possession, Orders of Examination and Earnings withholding Orders; and as a result of a change to the Gated Community access statute as of January 1st 2015, an RPS no longer has to identify to the guard at a gated community the party they have come to serve.

We have been granted limited exemption from trespass in order to effectuate service, and per Evidence Code 607, a proof of service signed by an RPS has the presumption in a court of law as being accurate and truthful, shifting the burden onto the opposition to prove otherwise. In addition, per the Code of Civil Procedure, fees for service of process, for locating servees, and for doing stakeouts are recoverable. It is fair to say that this association and our legislative advocate have worked very, very hard over the years.

More recently, last October during our annual Conference, the newly elected Board held a meeting, and during that meeting we discussed a document which is known as the OASIS paper. Generally, it involves the development of standards and practices for the expansion of legal services including electronic Court Filing and electronic Service of Process at the Court level. The comment period was quickly approaching, so a special legislative sub-committee was formed with the goal of ensuring that CALSPRO's comments would be timely submitted to address keeping due process, and fair and equal access to the courts at the forefront of the dialogue of standards and practices of the Courts and the legal and legal support communities. During this process it became quite clear that as an association, our best practices would need to include an e-filing and e-service component. Our comments were submitted timely and our best practices were revised, with our membership being apprised.

Our association is evolving, and remaining at the forefront of our profession and our industry. It is the hallmark of successful organizations to challenge complacency and the status quo, and CALSPRO is striving to do just that. We are sending updates and information about what's happening more frequently to keep our members current and informed. As a matter of fact, on January 29, 2016 we advised our membership of CALSPRO's Alliance with the Coalition for Improving Court Access

(CICA), whose purpose is to ensure fair, equal and open access to electronic courts for service providers and their filers. Since then, we have been sending regular updates as many counties in California are systematically moving to eFiling/eService.

So, this brings me to reflect on a simple question that was recently asked of me in a meeting, which has had a profound widespread positive impact on how I think and what I do in areas such as work, health, family, finances and my future. I am sharing this because I am now compelled to in contemplation of the question, which was: What are the top 3 things that I am not doing but should be? And the follow-up query, "Why aren't I?". After reflection, it became quite clear that I could fulfill my duty and commitment to this association and our membership at an even higher level, while also doing the same in the other areas like work, health, life-balance and financial planning.

As CALSPRO evolves and we take stock in where we came from, we have a duty to ask the question in regard to how we function, how we serve our members, how we serve the legal community, how we provide ongoing education and how we will continue to preserve, protect and promote our profession. You can already see improvements in communication

Continued on page 16



CAPITOL REPORT

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

KEY BILLS ADVANCE

April, May and June are critical months in the California Legislature. Over this period the Assembly and Senate conduct policy committee hearings on the more than 2000 bills introduced each year. Each house begins by considering its own bills, then turns to bills passed by the other house. After a summer recess in July, each house returns for floor votes in August, adjourning at midnight, August 31.

Of the 2000-2500 bills introduced this year, about one-third will ultimately become law. Many bills never gain traction, while others are abandoned by their Assembly or Senate authors. Once in a while, a committee actually will kill a bill; not surprisingly, this occurs far more often on Republican-authored bills in the Democrat-controlled legislature. But hundreds of Republican bills are passed and signed each year by Governor Brown, as the system is actually more bipartisan than the public perceives, and certainly more than Congress!

CALSPRO has now read and evaluated every bill introduced in 2016, and we continue by reading every amendment to every bill, as bills originally introduced with no impact on the industry can always be amended into something of concern.

Without question the most important bill this year to us is AB 2244 (Gatto). Suggested to the author by the Coalition for Improving Court Access (CICA), of which CALSPRO is a critical coalition member, AB 2244 deals with the evolving subject of electronic filing in courts. The

bill resolves ambiguities in current law relating to e-filing, and is helping to build the statutory infrastructure for the use of this technology.

Specifically, AB 2244 clarifies that mandatory e-filing, which is increasing throughout the state for particular case types, constitutes a recoverable cost for purposes of Code of Civil Procedure Section 1033.5. The bill also clarifies that fees for hosting documents by electronic filing service providers are recoverable costs when required by courts. Next, the bill clarifies that electronic filing service providers, when required by courts to collect and remit fees to complete electronic transactions, are agents of the courts for that purpose, and may collect actual convenience fees when required by courts or electronic filing managers to pay with credit cards. Electronic filing managers would be subject to the actual cost standard, as well.

As to payment options, the bill requires courts and electronic filing managers to permit more than one method. A menu of payment options must be created, which may include credit and debit cards, electronic funds transfers, ACH transfers, and other options which may have no cost, such as e-checks.

Finally, the bill requires EFSPs to process transactions without cost to filers who are exempt from the payment of filing fees, such as indigents.

AB 2244 was approved unanimously on April 12 by the Assembly Judiciary Committee, and will next be heard in the

Assembly Appropriations Committee. Assuming that the bill continues to move, it will be heard in the Senate in June.

Also moving forward in the legislative process is AB 2211 (Linder), dealing with writs. This CALSPRO-sponsored measure responds to a small number of counties which have interpreted current law to require the registered process server who opened the file with the sheriff to also serve the writ and complete the deposit afterwards. While the problem is narrow, the interpretation of current law is not irrational, given the plain wording of the statute, and it should be corrected. The clarification will apply to writs of attachment, writs of execution, and earnings withholding orders. AB 2211 has already passed the full Assembly, and also will be heard in the Senate in June.

There are various other bills pending of interest to CALSPRO, covering such diverse subjects as deposition subpoenas, service on opposing counsel in marital dissolutions, clean-up of recent legislation relating to medical records authorizations, electronic recording of documents with counties, and more. Stay tuned for updates on these bills as the legislative process continues to move towards an August conclusion.



CALSPRO Legislative History by the Decade

By Steve Janney, Legislative Chair

The Legislative Cornerstone has always been a significant priority of our association.

As a bit of a history buff, I thought it might be interesting to look back and remember some of our legislative past.

10 years ago there was significant legislation regarding procedure. It included:

AB 758 – This bill changed the requirement for the return of proofs of service after performance of a levy from 5 calendar days to 5 court days. The bill clarified language relating to the required “affidavit” stating the manner of levy performed after service of a writ of attachment or execution; now only requiring proof of service on the holder of the property. Other changes were made to the requirements for service of process on writs of possession.

AB 2302 – passed and added Chief Executive Officer, Controller, and Chief Financial Officer as authorized agents for service upon a corporation.

AB 496 – CAPPS Sponsored bill AB496 clarified that service at penal institutions could be made by any person authorized to serve process, at a state or county institution. This bill also changed the Code of Civil Procedure in that the court would issue and retain the original summons. No longer would the original

have to be returned after all defendants were served and it eliminated the entire procedure for a lost summons. Also, it eliminated the notice requirement when a party was subpoenaing their own personal records.

Today we no longer scramble to complete proofs of service of writs served on a Friday, especially when Monday was a court holiday. Legislation added 3 officers as authorized agents allowing for personal service, a great benefit for our clients. And I realized, when writing this article, I have not had to write a Declaration re: Lost Summons in over 10 years.

20 years ago legislation focused on the process servers place in our system of due process.

AB 758 – Registration act is amended, eliminating the concept of serving under another server’s registration number, fingerprinting and background checks, and the issuance of ID cards. The bill carried 15 items that related to process serving and photocopying. The bill took opposition from trial lawyers, bankers, county clerks, and others.

Employment Development Department – Because the EDD is working on the industry specific regulation, all EDD process server tax audits have stopped.

SB 1375 – Supported an amendment to exempt process servers in the Private

Investigator Act. The amendment clarifies that a registered process server does not violate the investigator licensing law when performing a service of process. This permits a process server to legally perform skip trace assignments in conjunction with a service of process assignment. (B&P § 7522(m))

Today we have EDD industry specific regulations dealing with several aspects of our profession, including independent contractors. We continue to strengthen our registration requirements to help improve our trust and reputation with the legal community. And our skip trace departments no longer are subject to complaints filed with the Department of Consumer Affairs. Plus, AB758 showed we could pass legislation despite opposition from other significant players.

30 years ago legislation focused on getting our name in the codes and the continuing fight for our Best Practices even before they were defined on our website.

AB 169 – The California Discovery Act was passed, inserting “registered professional photocopier” throughout the photocopying and discovery process.

SB 654 – Renumbered recoverable costs provision and added “registered process server” more prominently in the statute.

SB 944 – Collectors bill to provide for service by mail defeated.

Today Registered Process Server and Registered Professional Photocopier are familiar parts of the Civil Code of Procedure, Business & Professions Code and Evidence Code among others. We are recognized by the legislature, the court, the sheriffs and all parts of the legal community as an important part of due process. And through us, the battle for trusted, verifiable service of process continues.

CALSPRO's entire Legislative History can be reviewed on our website at calspro.org/legislation/legislative-history/. Check it out, it is pretty interesting. It includes both proactive and reactive legislative efforts.

But while reading, don't forget that it could never have been written without the committed men and women who preceded us in this organization with a vision for our industry that included professionalism, integrity and a belief that we play an irreplaceable part in our legal system and due process.



CALSPRO Advertising Update

By Robert Porambo, Advertising Chair

I would like to welcome our newest vendor member to CALSPRO: **Stan Burns Insurance Services, Inc.** Their president, Tom Burns, is excited to be part of CALSPRO and looks forward to serving our members. They provide ALL commercial business insurance products for companies involved in the process serving, court filing, photocopy and attorney service industry. Check them out at www.stanburns.com or give them a call at 800.491.7655.

Our vendor members are a vital component to CALSPRO and I strongly urge all of our members to support these companies that support our association. Pay it forward!

If you know of a specific vendor or industry that would benefit CALSPRO and its members, please shoot me an e-mail or call me so we can approach them on joining our association.

Thank you, Robert Porambo
rporambo@knoxservices.com

ELECTRONIC FILING – NUTS & BOLTS

As electronic filing moves in throughout the State, many members are in the midst of uncharted territory and are in dire need of information. We hope to use this space, as well as monthly eNews updates to bring you as much information as possible.

In terms of electronic filing at court, just as you need to plug into a socket to run a washing machine, you will also need to "plug in" at court. To accomplish this, you may elect to become an Electronic Filing Service Provider (EFSP) or contract

with an EFSP in order to file documents at Superior Court. The vast majority of us will be in the latter category & will be signing up with an EFSP. The EFSP must be certified in the case of Tyler courts and designed to accept non-party, non-attorney accounts, such as a legal support professional.

Currently, Green Filing, a certified EFSP, offers a stand-alone branded portal to attorney service companies. For further information, contact www.greenfiling.com Telephone: (801) 448-7268.

Other EFSP's currently certified are Tyler's own eFileCA portal and One Legal. In doing good diligence to best serve your customers, you may choose to contact all current providers to find the best solution that works for you. There is no one-size-fits all scenario. Talk to your court administrators. Seek out information from fellow CALSPRO members. Call a CALSPRO Director if you are not sure where to start. The key is don't wait. Get started now.



NAPPS 34th Annual Conference & Educational Seminar

June 2-4, 2016



**Sandia Resort & Casino
30 Rainbow Rd.
Albuquerque, NM 87113**

Ph: (505) 796-7500*

**mention you are with NAPPS and receive our negotiated
room rate of \$179 + tax per night.*

visit www.napps.org for more information



CALSPRO Membership Update

By Cliff Jacobs, Membership Chair

In support of our goal to provide more tangible benefits to our members, we have attached a sizeable discount certificate as an added value tool for CALSPRO members to use in speaking with non-members and inviting them to join CALSPRO. We introduced a referral program benefitting our members early in 2015. Although several members have taken advantage of this benefit, in speaking with our members throughout the year and during the recent renewal period, it seemed that many of you were still not aware of how to access this great benefit, which is a triple win: for the Association, the new member, and for you.

The CALSPRO Referral Program:

You, as a CALSPRO member in good standing, can give the gift of sizeable membership discount to a prospective member; and upon their approval as a new member, you will also receive the same discount as credit when you renew your membership next January. This discount can be as much as \$150 off of your renewal dues. What's more, once the prospective member is approved, they can then refer others to join and offer them the discount too, as well as receiving the discount themselves when they renew in January.

Benefits:

1. Instantly reduces the new member's fee to join CALSPRO as a gift from an existing member.
2. Reduces the referring CALSPRO members renewal dues by the same amount at renewal time.
3. Increases our overall membership leading ensuring a strong, healthy and growing association.

How It Works:

This form (attached) allows you, as a CALSPRO member, to give the gift of a sizeable discount when you invite non-member legal support professionals to join CALSPRO. *Put your name* as the referring member (Individual Member) or *Company name* (Company Member) or *both names* (if you are both an Individual and Company Member) on the form *before sending* or giving it to the prospective new member.

Example:

Referral Discount Program



\$50.00 off Individual Membership
\$75.00 off Company Membership
\$25.00 off Associate Membership

New Member Information

Name: _____

Company: _____

Referring Member Information

Name: _____

Company: _____

The new member should include the certificate as part of their application.

Even if they forget the certificate, or lose it, as long as they request the discount and remember to put your name on their application as the member that referred them, you both will receive the discount. The certificate serves as both a reminder to that person to send in their application, and as definitive documentation that you referred them.

Details:

When a *new member* (defined as a person or company that has not been a member for the past 3 years) includes the referring member's name on their application in the "referred By" line on the reg. form, and/or includes the attached certificate identifying the referring member, the new member will receive an instant discount to their application fee upon approval as a new member, and *the existing member will receive the same discount when paying their annual renewal dues* for the next year. It's very simple and well worth the effort.

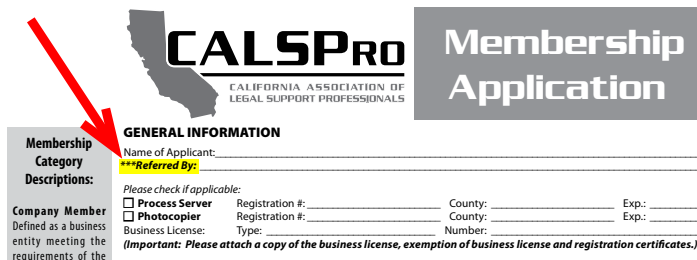
Any existing CALSPRO member in good standing who refers a non-member that joins our Association will be given a discount upon their timely renewal of their membership prior to the annual deadline. The highest two discounts per member will be honored.

Continued on page 11

Examples:

1. An Individual CALSPRO Member referring a new Individual Member and a new Company member would provide (via the certificate) a \$50 and a \$75 discount respectively to join CALSPRO. Upon their approval, the referring member would receive a \$50 and a \$75 discount at renewal bringing their \$200 Individual renewal fee down to \$75, a substantial savings.
2. A company member referring the same that refers 2 new Company members would give them each a \$75 discount when joining, and the existing member would receive a 4150 DISCOUNT WHEN RENEWING, BRINGING THE \$500 renewal dues down to just \$350.

Example Application:



CALSPRO
CALIFORNIA ASSOCIATION OF
LEGAL SUPPORT PROFESSIONALS

Membership Application

GENERAL INFORMATION

Name of Applicant: _____

***Referred By: _____

Please check if applicable:

☐ Process Server Registration #: _____ County: _____ Exp.: _____

☐ Photocopier Registration #: _____ County: _____ Exp.: _____

Business License: _____ Number: _____

(Important: Please attach a copy of the business license, exemption of business license and registration certificates.)

Membership Category

Descriptions:

Company Member
Defined as a business entity meeting the requirements of the

In addition to the new member receiving the immediate discount off their membership fee, the referring member will receive the following discounts on their renewal fee:

\$50 discount for referring an Individual Member upon their approval.

\$75 discount for referring a Company Member upon their approval.

\$25 discount for referring an Associate Member upon their approval.

This is truly a win-win-win for the new member, you and the association.

Please take advantage of this and be proud to offer this discount certificate to a potential new members all year long.

They'll benefit in many ways from becoming a CALSPRO member, and so will you!

Our Administrative office has e-mailed the Certificate to all of our members, but if you need another .pdf sent to you, simply ask.

You may also use the following certificate as needed:

Referral Discount Program



CALSPRO
CALIFORNIA ASSOCIATION OF
LEGAL SUPPORT PROFESSIONALS

\$50.00 off Individual Membership
\$75.00 off Company Membership
\$25.00 off Associate Membership

New Member Information

Name: _____

Company: _____

Referring Member Information

Name: _____

Company: _____

A new Individual, Associate or Company Member joining CALSPRO shall have their membership fee instantly reduced by the amount as stated above by entering the referring member's name as requested on the application, as well as submitting this certificate along with the application. The Existing referring member will receive up to two referral discounts upon renewal the next year, but may offer the new member discount without limit to potential new members all year long. Existing members will qualify for the two highest renewal discounts as follows: \$50.00 discount for a new Individual member, \$75.00 discount for a new Company member, and/or \$25.00 discount for an new Associate member upon their approval as a new member.

Submit this document with your new membership application which can be downloaded from www.calspro.org



Coalition for Improving Court Access Update II

In our last update, we discussed the formation of the Coalition for Improving Court Access (CICA) and that the CALSPro Board elected to join the Coalition as a voting member. To summarize, the Coalition has set forth a dozen goals and objectives that include in part: Requiring an Electronic File Manager (EFM) to accept multiple forms of payment & not just credit cards; That we bill our clients to file electronically may be recoverable costs; that EFMs and EFSPs comply with California law and rules of court; That through education, negotiation, advocacy and legislation, the Coalition would work to keep the value of legal support profession in the forefront of the judiciary and legislature.

The decision to join the Coalition was not one made without a great deal of consideration to the goals and objectives of the members of CALSPro. We are all contending with the reality that technology is changing the way we do business. We've heard it dozens of times, "Remaining Relevant in the Digital Age". So often said, but in terms of breaking it down into action items, we expect that most members are still working to define

what it really means in terms of business practices. One common denominator is that we remain informed and to this end, we made the important decision given the constantly changing landscape to join the Coalition. By doing so, we place the Association in the position of receiving Coalition reporting firsthand, hold voting status on the Coalition

and able to inform and advise CALSPro members accordingly.

In terms of activity at court with information sourced from Tyler's EFM Compass Check dated April 20, 2016, here's a snap shot of the Courts transition to mandatory efilng via the Odyssey EFM platform:

Courts Live Today With Odyssey	Courts on Tyler's Upcoming List
San Luis Obispo	Butte
Kern	Santa Clara
Kings	San Mateo
Merced	Alameda
Santa Barbara	Sutter
Fresno	Yuba
San Diego	Los Angeles
Orange	El Dorado
Santa Cruz	Mariposa
Monterey	Ventura
	Riverside
	Contra Costa County

FOR Sale: **Zip Codes**

1-800-PROCESS

Is Offering Zip Codes For Sale.

If You Purchased The Zip Code, Anyone From Anywhere Can Directly Connect With Your Office. No Middle Man Is Involved. You Negotiate Your Own Deal With The Caller. No Call Center, No Commissions, No Sharing The Wealth. Anyone That Calls 1-800-PROCESS, Clicks Or Calls The Zip Code Purchased And They Are Directly Connected With You. Simple, Effective And Totally Owned And Controlled By You.

***You Own A Piece Of 1-800-Process Through Zip Codes.
All Calls Going To Your Zip Code
Go Directly To You With A Direct Connect.***

Interested?

***Go To 1800PROCESS.com
Or Call Doug Kramer At
1 800-687-0130 For More Information***

Note that county by county there is a varied plan for adoption of electronic filing. In some counties, the family division will go live first. In others, civil and family are slated to move forward at the same time. In Los Angeles, probate court is Tyler's focus. Fairly consistent is the fact that criminal divisions will continue to process documents over the counter for months to come. The point overall of this illustration and information is that the progress is real. And in fact, many of our members are already knee deep in mandatory electronic court filing. If you have not yet been impacted, it's safe to say that you will be in the not too far future. As we touched on, and will again, it is imperative that we all remain informed so that we may be proactive in our approach to the new system.

In terms of recent Coalition activities, Jeff Karotkin, CICA'S Chief Executive Officer has been making impressive strides with the Coalition agenda. Assembly Bill AB 2244, initially addressed in our March 18th update, received a unanimous vote in the Assembly Judiciary Committee and is headed to the Assembly Appropriations Committee. As you'll recall, the bill would allow vendors to charge the actual convenience fee for the use of a credit card to pay efile fees. Further, the bill provides that the costs filers incur are recoverable. Finally, the bill provides that indigent filers not be charged by vendors to use an efile portal. This proposed legislation, provided to CALSPRO to review and input on before submission, will prove to be effective to us in a number of ways. If EFM's and EFSP's are not checked by rules along these lines, we could then be subjected to unregulated charges for credit card usage by a vendor. Further, that our clients may recover the costs they incur to file through our companies is critical. Our costs to file at the counter, serve process, complete copy requests, etc., are recoverable. AB 2244 serves to codify the cost of efile transactions as well.

In addition to AB 2244, the Coalition is working diligently to be the voice of the legal support profession. Space does not allow here to detail the number of conversations had in an effort to

educate and advocate. The fact is, there exists an information gap between the Court, the EFM (Tyler as an example) and the parties attempting to use the court in this new "eco-system". The court is relying upon the EFM, a for-profit vendor hubbed out of state, to set up an effective and global system. The vendor has the technological capacity but may not hold the knowledge of California law and rules of court, at least to the extent that a seasoned member of CALSPRO might possess. Further, the EFM relies on a business model that allows the EFM to direct filing traffic to its portal. If unchecked, this could result in an environment that unduly challenges legal support professionals as they work to serve their customers and hampers efforts to establish competitive pricing points. The Coalition is very much involved with filling the information void and pointing out inequities in the design of the new platform.



Statewide, the Court has created committees charged with policy creation relating to implementation of the new technology. The California Judicial Council's Information Technology Advisory Committee (ITAC) includes judges, primarily, as well as local court executive staff, court technology staff, and others. ITAC is working to finalize a work stream proposal that will be relied upon statewide to manage electronic filing and electronic service. The Coalition began attending telephonic meetings and submitted written comments to the proposed work stream model. This written commentary caught

the attention of ITAC leadership. The delegates were also on that call and it was clear the Chair wanted that submission reviewed by the next meeting. This led to an extremely important face to face meeting between ITAC and the Coalition and the opportunity for the Coalition to set forth its goals and objectives. The meeting led both parties to find much common ground and alignment moving forward.

In addition to this meeting, the Coalition, including Jeff Karotkin and Jeff Ellis, traveled to Texas for a face to face meeting with Tyler executive staff to discuss implementation of the efile platform and expectations on both sides. There is still much work to be done, but there is open dialogue. Further an important outcome of this meeting was an invitation from Tyler to participate in the ongoing meetings of the eFileCA Configuration Standards Committee. This committee is made up of approximately 30 individuals from Tyler CMS courts. Jeff joined a telephonic meeting and used this opportunity to discuss the myriad of problems filers are having using the mandatory system; that if given a choice, users would not efile because the failure rate is so high. The Coalition and Tyler have come away from these meetings on common ground in terms of the need to create more uniformity from county to county. Additionally, and of global importance to the Coalition and CALSPRO is development of fair messaging and competition. The basis here is that all parties involved recognize the value of the legal support professional, whether that be a CALSPRO member who has invested in a portal and will be certified as an electronic service provider or those of us who will contract with portal providers so that we may continue to serve our customers. Currently there exists marketplace confusion as filers are being directed to Tyler's Odyssey File & Serve portal by court websites, links at local bar association sites, direct mailings and training materials. The environment is designed to a multi-portal system, but

Continued on page 12

current conditions are confusing that message. The Coalition is working to remain in conversation with Tyler, the Judiciary and Court executive staff on these issues so that corrections may be made and the playing field is level and accessible. Legal support professionals have played an essential role in this process for decades. The public is better served by the quality of the final product that fair competition brings to the market place. We expect this agenda item will remain at the forefront moving forward.

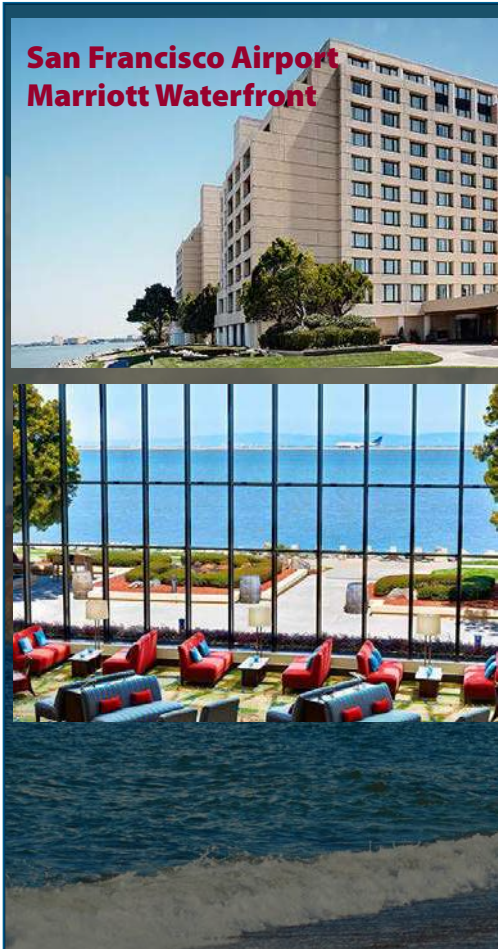
For all members, collectively, if you are not up to speed on your court's conversion to efilng, a conversation with court management is in order, so that you may work on your own agenda for converting your office practices. In larger markets, there will be a number of filing providers who have paid for portal certification so that they may file on behalf of customers, including affiliates. Establishing partnerships, pricing plans, marketing strategies and preparing

customers for the conversion are factors to consider over the coming months. Evaluating equipment, computers, scanners and internet connections are items to add to a to-do list. Electronic filing will also include the need to advance filing fees for customers. A healthy credit line might be necessary. A visit with your local banker may be in order. Further, knowledge of applicable local rules, California code and Rules of Court will be helpful as assist customers through this process.

Remaining Relevant In the Digital Age. This could well mean something different to each one of us. One common denominator to us all should be the avoidance of the Head in the Sand Syndrome. Remain informed and involved with CALSPro. We will continue to send out updates and information on related issues. As we carry information to you, we are also looking to our membership to bring information from your local courts to us. Problems with implementation, rejected filings, limits

on payment options, marketing issues, to name a few. Please send this type of information our way. Any questions and concerns, please get in touch with a Coalition delegate, Board member or Jeff Karotkin directly. Being informed and the exchange of information are important to all of us on the road to Relevance.

**CALSPro Coalition Delegates,
Chad Barger
Wendy Bowman
Andy Estin**



SAVE THE DATE
CALSPro 48th Annual Conference
October 7th – 9th, 2016

Meet the CALSPRO Board Members

In our last issue we began a feature on our leadership and biographies of some of our Board members and Officers. We continue that here with Chad Barger, Cliff Jacobs, Steve Janney, Larry Kirlin & Robert Porambo.



CHAD BARGER

Back in the early 1990's, Chad began his legal support career as an investigators assistant at a local Bakersfield law firm. There he learned the ropes of private investigations, process serving and the court system, while studying criminal justice at Bakersfield College. In 1992, Chad accepted a job with a Bakersfield attorney service as their branch manager. Chad realized he had a knack for the legal support profession and in 1994 he opened Attorney's Certified Service with his wife, Belinda, and grandfather, Charles. In 1995, Chad accepted a position with the Kern County Sheriff's Department. While with the department, he worked in a variety of assignments including the county jail, local patrol, Sheriff's Emergency Response Team (SERT). As well, he taught restraint techniques, cell extraction and stun gun procedures at the Sheriff's Academy. In 2001, Chad decided to leave the Sheriff's Department and return to Attorney's Certified Services. Chad became a member of CALSPRO in 1994. He has served on the Board of Directors since 2007. He has also served as the President, Vice President, Continuing Education Vice Chair and Area Governor. He is currently serving as Chairman of the Board of CALSPRO and sits on the Legislative and Conference committees. Even with an

extremely busy life, Chad has always put God and his family first. Belinda and their three children, Caleb, Jacob and Hannah, are life's real treasures. He enjoys spending time anywhere with his family. Chad also enjoys hunting and fishing.

CLIFF JACOBS

Cliff Jacobs earned his Bachelor of Science degree in Administration of Justice from Rutgers University, and attended NYU's pilot Graduate Intensive Studies Paralegal program, where he graduated 3rd in his class. He moved to CA from NY in 1988 and began his career as a Legal Support Professional in 1990 as a route driver and court runner for Personal Attorney Service in Van Nuys. He has done virtually every job within an Attorney Service over his 27 year career, and is currently One Legal's National Affiliate Relations Manager (since 2009). One of Cliff's passions is making a difference through service. He served as Los Angeles Area Governor in 2004 and 2005, and joined CALSPRO as a member in 2006. At the annual Conference in 2006 he was named CALSPRO's Rookie of the Year. He was subsequently recognized as Member of the Year in 2009, and again in 2012. Cliff has served on the Board of Directors and/or as an officer of CALSPRO for the past 8

years, and is currently in his second term as President. Since 2006, he has served on most of CALSPRO's Committees, and has chaired the Technology and Membership Committees as well as chairing the Continuing Education Committee for 7 of the past 8 years. Not a stranger to service, Cliff is also currently the Vice President of the Marin County Legal Professionals Association, and serves the public as a Marin County Library Commissioner. He has a passion for this profession and has had several articles published regarding Due Process, Service of Process and CA codes.

STEVE JANNEY

Steve was born into a "legal support service" family in 1951. His dad, Jack Janney, was an early member of the Los Angeles process serving community. And Steve served his first paper on January 23, 1969, his 18th birthday, when he finally conformed to the civil code of procedure by being "over the age of 18 and not a party to the action." No Business and Professions Code for process servers back then.

Continued on page 14

Steve graduated from high school in 1969 and Biola University in 1980. He likes to say "I squeezed 4 years into 11." He graduated with a degree in Education with a minor in Theology. After a year in graduate school, he joined his dad and brother, Doug, as the process manager of Janney & Janney Attorney Service. In 1983 he married Dana Walker, and they have three children, Linda, Matt & Paul.

Steve has served in a variety of positions in CALSPro. He was the newsletter editor, has served several terms on the board of directors, was elected twice as secretary-treasurer, chaired the Strategic Planning Committee and has served three terms as President of our association.

Steve currently serves as a board member and chair of the Legislative Committee. He enjoys building on the legislative foundation of those who preceded him and is enthusiastic about our current legislative goals and direction.

Steve was awarded the Bert Rosenthal Memorial Award in 2011, following his father who posthumously received the award in 2008. Both Steve and his brother Doug continue to be active members in CALSPro, believing that their membership is important to themselves, their company and our profession.

When asked about his life in the legal support industry, Steve said, "I think back over the past 40 years and I never would have imagined being where I am today. After 40 years, I would describe myself as a blessed man. I have had enough joy in my life not to be overwhelmed by sorrow, and enough sorrow to appreciate the joy. I have a life filled with purpose for today and hope for tomorrow. I have learned the difference between knowledge and wisdom, valuing the latter over the former."

LARRY KIRLIN

Larry's professional life began when he enlisted in the Navy's delayed entry program shortly after his 17th birthday. He

left for boot camp after graduating from St. Pius X High School in Pottstown, PA., and during active duty service (1985-91), he was trained as an aircraft electronics technician and traveled the world repairing the Navy's aircraft. Chapter two began when he left active duty to pursue a degree in Electrical Engineering at California State University, Fresno. While attending college and continuing with the Navy as a reservist, Larry began working in the legal support industry in 1991. He has been with his current employer, First Legal, since 2012. Larry became a member of CALSPro in 2008 because he wanted to be more involved in the leadership of the legal support industry. Since then, Larry has served as the membership chairman, assault chairman, vice president and on the Board of Directors since 2010. Before becoming actively involved Larry worked with many CALSPro members as an affiliate. Larry firmly believes that being involved in the Association and the sharing of work and ideas has helped him throughout his career. In addition to be of service to CALSPro, Larry volunteers for the Poverello House in Fresno, as well as Yugo Ministries.

ROBERT PORAMBO

Robert began his career with Knox Attorney Service, Inc. in 1981 and has held many positions throughout the years. In 1995, Knox founded a sister company Knox Services, LLC. Robert is the minority owner. Robert is a big believer in the theory of leaving things better than you found them. He has a deep and passionate interest in being involved with CALSPro as his way of paying forward to an industry that has provided for his family for over 34 years. He also believes that by staying involved in CALSPro, it is his way of honoring our predecessors; those individuals who banded together to protect the industry in years past. In addition to his work with CALSPro, Robert also proudly serves on the Board of Directors UR Charities, a non-profit organization that serves individuals with special needs. Between him and his wife, Liz, they have six children, three grandchildren and four grand-dogs!



SAVE THE DATE:

20TH ANNUAL CALSPro
JACK C. JANNEY MEMORIAL
GOLF TOURNAMENT

OCTOBER 6, 2016
Tee Time: 8:00 am
4 team, golf scramble

LOCATION:

Crystal Springs Golf Course
6650 Golf Course Drive
Burlingame, CA 94010

LUNCH FOLLOWING GOLF:

Beginning at 12:30 pm
in the Pub & Grill

FOOD COURSE:

Italian Godfather Buffet

For more information visit:

www.calspro.org

VENDOR LISTINGS

Gorilla Stationers

15165 Trinton Lane
Huntington Beach, CA 92649
www.gorillastationers.com
(714) 845-3969

Journal Technologies, Inc.

391 N. Main Street #303
Corona, CA 92880
www.journaltech.com
(949) 280-0768

Lanterman Insurance Agency, Inc.

5318 E. 2nd Street #643
Long Beach, CA 90803
www.lantermaninsurance.com
(562) 912-4364

ServeNow.com

11693 San Vicente Blvd. Suite 910
Los Angeles, CA 90049
www.serve-now.com
(877) 737-8366

Stan Burns Insurance Services, Inc.

P.O. Box 3309
Torrance, CA 90501
www.stanburns.com
(800) 491-7655

TriStar Software

1704 Spring Street Suite 202
Paso Robles, CA 93446
www.tristarsoftware.com
(805) 227-1213

CALSPRO 2015 - 2016 Officers

PRESIDENT

Cliff Jacobs

415/475-6213 – ph
866/420-1541 – fax
cjacobs@onelegal.com

VICE PRESIDENT

Larry Kirlin

559/233-1993 – ph
888/943-1355 – fax
lkirlin@firstlegalsupport.com

SECRETARY/TREASURER

Robert Porambo

619/549-4853 – ph
619/685-4294 – fax
rporambo@knoxservices.com

2015 - 2016 Board of Directors

Tom Alkema

909/594-5995 – ph
909/598-2308 – fax
talkema@ronsinc.com

Chad Barger

661/327-8022 – ph
661/327-8179 – fax
cbarger@attorneyscertified.com

Wendy Bowman

408/295-3300 – ph
408/491-9772 – fax
wendy@sterlingmadison.com

Ken Hastings

951/296-2669 – ph
951/296-2770 – fax
service@hastingspps.com

Steve Janney

213/628-6338 – ph
213/483-2576 – fax
steve@janneyandjanney.com

Michael Kern

213/483-4900 – ph
213/483-7777 – fax
mkern@directlegal.com

Larry Kirlin

559/233-1993 – ph
888/943-1355 – fax
lkirlin@firstlegalsupport.com

Mark Manchester

805/658-8454 – ph
805/658-8628 – fax
mark.manchester@rezacmeyer.com

Robert Porambo

619/549-4853 – ph
619/685-4294 – fax
rporambo@knoxservices.com

Kristian Pujol

805/650-9291 – ph
805/658-8170 – fax
kris@comproserve.net

Lauri Taylor

661/324-8018 – ph
661/324-0451 – fax
lauri@amslegal.net

Legislative Advocate

Michael D. Belote, Esq.

Administrator

Jennifer Blevins, CMP

jennifer@caladmanagement.com

Membership/Co-Administrator

Stephanie Schoen

stephanie@caladmanagement.com

Publications

Nathan Carlson

nathan@caladmanagement.com

Webmaster

Michael Cochran

michael@caladmanagement.com

Advertising /CCPS

Natalie Thurn

natalie@caladmanagement.com

Accounting

Tricia Schrum, CPA

tricia@caladmanagement.com

California Association of Legal Support Professionals

2520 Venture Oaks Way, Suite 150
Sacramento, California 95833
Phone: (916) 239-4065 • Fax: (916) 924-7323
Web site: www.calspro.org
E-mail: info@calspro.org

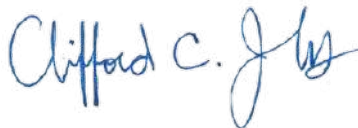
to our membership, increased member benefits, a very active legislative agenda led by our best and brightest, and strategic relationships being formed such as our membership in CICA. You will also see an improved and shortened membership application, will see how our membership programs can provide substantial savings. We are working on quicker response times to process changes to your online listings, and are committed overall to providing our membership with world class customer service.

Regarding education, we are figuring out the details to be able to provide our CCPS workshop as a webinar so that more people (members and potential members) can take advantage of the training and legislative updates; and once we accomplish that, we will move forward with obtaining MCLE status for our educational programs. We have also considered, and have a working model of a 1 hour portion of our CCPS workshop that would also be appropriate for legal support staff and attorneys to partake in. Again, the details are being worked out, but it is very feasible that in the near future we will have attorneys and legal secretaries join our CCPS workshop for that particular hour and earn MCLE credit; while affording our members and attendees a great networking opportunity, and showing the law firm attendees the difference using a CALSPro server will make in terms of their knowledge and efficacy.

As a final but very important note, I'd like our membership to be aware that there have been several conversations with a potential vendor that will be providing the opportunity for any of our members, from the Individual member to our largest Company member to have their own branded portal to the Tyler Courts as they come on line. This vendor provided a short preview demo of their capabilities, and the branded portal will display your company logo and also your color scheme. They are working on offering this portal at a reasonable set-up cost, and have shared that after the initial setup, they will be asking for a modest (1.00 per transaction) fee. Please know that you will have a choice, because this is the second vendor that I am aware of that will be offering a branded portal, so if you thought you would not be able to engage in eFiling, perhaps there will in fact be a way for you to offer that to your clients.

So I now ask you, "What are the top 3 things that you aren't, but should be doing..."

Sincerely,



CALSPro COMMITTEES

ADVERTISING

Robert Porambo – Chairman
619/685-4223
rporambo@knoxservices.com

ASSAULT ADVISOR

Larry Kirlin
559/223-1993
lkirlin@firstlegalsupport.com

BY-LAWS

Brett Peters
805/650-9077
brett@janneyandjanney.com

CONFERENCE

Ken Hastings – Chairman
951/296-2669
service@hastingspps.com

DISPUTE RESOLUTION

Jeremiah Jones – Chairman
877/353-8281
jeremiah@boscolegal.org

eSERVICE

Michael Kern
213/483-4900
mkern@directlegal.com

FORMS

Tony Klein – Chairman
415/495-4221
tony@attorneyserviceofsf.com

LEGISLATIVE

Steve Janney – Chairman
213/628-6338
steve@janneyandjanney.com

MEMBERSHIP

Cliff Jacobs – Chairman
415/475-6213
cjacobs@onelegal.com

NEWSLETTER

Wendy Bowman – Chairman
408/295-3300
wendy@sterlingmadison.com

TECHNOLOGY & eSERVICE

Cliff Jacobs
415/475-6213
cjacobs@onelegal.com

TECHNOLOGY

Michael Kern
213/483-4900
mkern@directlegal.com

WEBSITE

Michael Kern
213/483-4900
mkern@directlegal.com



EDUCATION

Continuing Education Report

2016 CALSPro Continuing Education Schedule

"An investment in knowledge pays the best interest." Benjamin Franklin

When the economy challenges you to find a worthwhile investment, wise men have said throughout the years to invest in yourself. Your dedication to this noble profession can truly be augmented by a commitment to being the very best you can be. That being said, this is a great time to enhance your education, and if appropriate to invest in further educating your staff and servers at a CALSPro CCPS Workshop. While you are benefiting by absorbing knowledge that will return dividends in smarter servers, more efficient use of time, and ultimately

more revenue; you can also bolster the positive light in which you and/or your company is viewed by earning your CALSPro Certified Process Server (CCPS) designation. More and more law firms are seeking higher caliber servers handling their work, and you can meet that demand by becoming CCPS and encouraging your staff and independent contractors to do the same.

"There is no better investment that companies can make than in the education and development of their

own people." Tony Robbins
Knowledge is one key to your ultimate success; and the return on the investment to acquire that knowledge continues for a lifetime. Online registration and printable registration forms for the CCPS Workshop and Exam are available about one month prior to the workshop date at www.CALSPro.org at the EVENTS tab under Education, or at the Education Cornerstone under Education Events.

Here are the CCPS Workshop and Exam target locations and target dates for

May 14th – Central Valley (Fresno Area) Sanger - scheduled

June 11th – Los Angeles Area – seeking a location

July (9, 16, or 23) San Diego – seeking a location

August 6th – (date tentative, may be sooner) North Bay Area (Novato or San Rafael)

October 8th – EXAM ONLY – at the Annual Conference* in San Francisco - No Workshop

We are excited about these educational opportunities, and look forward to seeing you soon !!! If you would like to see the CCPS Workshop and Exam presented in your local area, and believe that there would be enough local support to have at least 20 people in attendance please discuss the possibility with Cliff Jacobs, at 415-475-6213. * The 2016 CALSPro Annual Conference will be held at the San Francisco Airport Marriott from Friday, October 7th through Sunday, October 9th. For more information please visit www.CALSPro.org.

California Association of Legal Support Professionals 2016 Calendar of Events

June 25, 2016

Board of Directors Meeting

Rosenthal Committee Meeting
Los Angeles

August 23, 2016

Board of Directors Meeting Conference Call

October 14, 2016

Board of Directors Meeting

Conference
Northern California

October 7-9, 2016

CALSPro 48th Conference

San Francisco Airport Marriott Waterfront

December 3, 2016

Board of Directors Meeting

Legislative Committee Meeting
San Jose

CALSPro 48th Conference

October 7-9, 2016

San Francisco Airport
Marriott Waterfront
1800 Old Bayshore Highway
Burlingame, CA 94010
650.692.9100

Please check the CALSPro website for a complete listing of all events, including CCPS Workshops and Exams. www.calspro.org