HAPPY AND HEALTHY 2020
FROM ICAP!

Wishing you
…..Fresh Hopes, Fresh Plans, Fresh Efforts, Fresh Attitude, Fresh Outlook
to Welcome 2020 and with it New Decade
ICAP Officers & Directors-2019

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president@icaponline.org

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Secretary: Samantha Armijo, CP, CCP
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CAPA Directors: Mary Diaz, Dana Fischel, ACP, CAS, CCP

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WSBCBA Liaison: Owen “Jay” Murphy JD
Richard T Fields: Michelle M. DeJohnette

If you are interested in becoming a board member, or assisting with board activities please let us know!

Membership Benefits

ICAP is a California nonprofit mutual benefit corporation which was founded in 1985 to promote the paralegal profession in San Bernardino and Riverside Counties.

Whether you are a working paralegal, student in paralegal studies or one who wishes to support the paralegal profession; your membership in ICAP is valuable to you, ICAP and the paralegal profession. On a personal level, it offers an avenue for networking, continuing education, and personal professional growth. On a larger scale, it contributes to the development, growth, and strengthening of the paralegal profession as a whole.

Some of the benefits of ICAP membership are:

ICAPtions Newsletter
A quarterly newsletter which keeps you up-to-date on important legal announcements and changes, continuing education programs, employment opportunities, and the happenings of your association.

Monthly Membership Meetings
A forum for exchange of valuable information via interaction with other paralegals and presentations by scheduled speakers.

Professional Involvement
Rewards of participating in one or more of ICAP’s committees, should you choose to do so.

Annual Salary Survey
Opportunity to participate in annual salary survey and receive results/report.

Networking Opportunities
Opportunities to network with other paralegals via membership rosters and/or face-to-face encounters at meetings/events. This is often the best way to obtain employment leads.

Members Only Section Access
You get access to the members only section of the ICAP website which provides employment opportunities, on-line newsletters, the CAPA resource directory and current and past annual salary surveys.

California Alliance of Paralegal Associations (CAPA)
ICAP is a member of CAPA which affords statewide representation of ICAP and paralegal associations including advisement regarding the paralegal profession. CAPA also offers several insurance, financial, and related service through benefit providers.

National Association of Legal Assistants (NALA)
ICAP is an affiliate of NALA. Members of NALA affiliated associations receive a waiver of the initiation fee should they decide to become NALA members—a savings of $15. As an affiliated association, ICAP also has free access to NALA NET for the most current information and case decisions affecting legal assistants. NALA NET is the only online network dedicated to this profession.
2020 ICAP Board of Directors

Samantha Armijo, CP, CCP—President/NALA Liaison/Parliamentarian

Owen “Jay” Murphy—Vice President

Lynn Voorheis—Treasurer

Dana Fischel, ACP, CAS, CCP—Board Director/CAPA Director

Mary Diaz—Board Director

Muriel Mateer—Secretary

Christina Boltinghouse—Board Director

About ICAPtions

ICAPtions is the official newsletter of the Inland Counties Association of Paralegals and is published quarterly.

Contributions
Contributions are encouraged and may include any legal related topic or other subject of interest to our members.

Publication Deadlines
March 31, June 30, October 1, and December 31. Send your contribution to our newsletter editor, at newsletter@icaponline.org.

Advertising Rates

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Ads must be submitted in digital format (tiff, etc.) or be camera ready. Ads must not specify dollar amount for services offered, and should be accompanied by payment in full to “ICAP.” Contact newsletter editor for details.

ICAP website: www.icaponline.org
Save the date

NALA 2020 Conference

2020 - July 9 - 11 (Thur - Sat) at Harrah's Atlantic City, NJ
CAPA CALIFORNIA CERTIFIED PARALEGAL EXAM
2020 Exam dates coming soon!

CAPA CCP Insider - Free Web Series in 2019
Monthly, Second Tuesday at 6:30 pm
https://www.caparalegal.org/ccp-insider
Greetings All! I hope that you had a wonderful holiday season. This time of the year is always full of reflection and hope. Resolutions are a great way to combine reflection and hope. Whether small, like drinking more water, or big, like completing a certification or buying a house, all resolutions are important and worthwhile. Making a list of steps needed to reach your goal and fulfill your resolution is a great way to realize success. Not only do you get the satisfaction of completing a resolution but you also get to celebrate the smaller victories of checking off the steps as they are completed.

ICAP, too, has been reflecting and planning changes for the future of the organization. Some things you can look for are changes to the bylaws, more social events, and a different structure for MCLEs. Something that will remain steady is ICAP’s unwavering mission to promote the paralegal profession in the Inland Empire. YOU are the organization and your input is always welcome. Please keep an eye out for opportunities to serve on committees or reply to questions on social media regarding activities. You can also reach out to me directly with any ideas or concerns.

As we enter a new year, and a new decade, the Board and I are excited to serve you and see what the future has in store for paralegals in California. I hope this year brings for you renewed happiness personally and professionally. Whatever your endeavors may bring, I wish you the utmost success.
At its last Board Meeting in 2019, CAPA Board Directors from the membership 10 organizations elected officers of 2020 CAPA Board. It is my pleasure to introduce to you the incoming 2020 CAPA Officers:

**President**—Victoria M. Falcon-Alonzo (Fresno Paralegal Organization)
**Vice President Policy**—Pamela Kightlinger (Kern County Paralegal Organization)
**Vice President Administration**—Andrea Henrickson (Fresno Paralegal Organization)
**Treasurer**—Dana Fischel, ACP, CAS, CCP (Inland Counties Association of Paralegals)
**Secretary**—Paula Tucker (Sequoia County Paralegal Association)

Navigating the complex issues surrounding any not for profit organization’s finances is an essential skill of an effective treasurer. Paralegal association’s treasurer serves as an organization’s primary financial officer, prepares its budget, fulfills the state and federal reporting duties and compiles data for an audit. In most other not- for- profit or governmental organizations such duties are divided among manager, treasurer and auditor. The fiduciary duty of the treasurer to the association’s members and to the wider community it serves molds the perception of the organization and its Board, so one may simply feel overwhelmed just by the list of the treasurer’s duties. As an incoming 2020 CAPA treasurer I would like to assure all of you that my actions regarding CAPA’s finances will be handled expediently and professionally, the organization’s funds will be invested prudently, reporting to FTB, IRS done timely and 2020 budget will reflect alliance’s goals and policies. In the future 4 Quarterly RECAP newsletter issues I would like to systematically dedicate my treasurer’s column to and share with you some helpful information regarding Budgeting, Journaling, Financial Reporting and Auditing techniques I have picked up as four terms ICAP treasurer and further acquired from “Accounting for Governmental and Non Profit Organizations” certificate program at the University of California Riverside.
DON'T FORGET ABOUT ICAP'S CREDIT CARD PAYMENT OPTION!

You have asked – we have listened. ICAP Board has decided to expend the ways you pay for ICAP’s services. As of August 1, 2017 ICAP accepts credit cards as a form of payments for MCLEs, membership renewals and other services “at the door” not only via PayPal. ICAP in partnership with Bank of America will start using the services of Clover Go - a mobile credit card reader. ICAP therefore can accept major credit cards such as VISA, Master Card, Amex or Discover. You can pay for the mandatory continuance law education seminars at the door with the credit card in addition to cash or check. Please keep in mind that the credit card transaction fee is 2.7% and it is not covered by ICAP. Therefore the fee for the member monthly MCLE when paid by credit card is $15.40 and non member is $25.70. The receipt for your payment will be e-mailed or texted to you.

ICAP Dinner MCLE Meeting Reservation Policy

A deadline for reservations is given on each general membership meeting announcement so that the caterer’s or restaurant’s reservation requirements can be accommodated. Caterers and restaurants generally require us to call in a definite number of reservations 48 hours before the meeting. If we have no-shows, we are still responsible for the payment of those reservations. Therefore, ICAP’s policy has been and will continue to be that no refunds may be given on reservations unless the member gives us notice, at a minimum of 48 hours (weekdays) in advance, that the member cannot attend. A member may, however, substitute another member for his or her reservation. Please let the person accepting the reservations know in advance, if possible, so that the sign-in sheet will reflect the substitution. Thank you for your cooperation. NOTICE: Returned check's are subject to a $25 fee for first time, $35 fee for additional returned checks pursuant to Civil Code §1719.
On June 28, 2019, the Task Force On Access Through Innovation Of Legal Services, a committee appointed by the State Bar of California Board of Trustees, met to discuss proposals to change the rules regarding legal practice to address the access to justice problem.

At the end of the day, the task force made a number of recommendations. Here are some of the more controversial ones:

- Allowing non-lawyers to deliver legal services.
- Allowing non-lawyers to have an ownership interest in law firms.
- Allowing technology-driven legal systems to provide legal advice.

All of the above will be allowed with proper regulation which has not been specified at the meeting. The debate over letting non-lawyers practice is nothing new. The rationale is to increase access to justice for those who cannot afford to pay an attorney. The assumption is that allowing non-lawyers to enter the legal marketplace will increase supply and will incentivize cost reduction.

In 2013, the ABA Task Force On The Future Of Legal Education in its report recommended that access to justice can be improved by allowing non-lawyer technicians to practice law in certain cases. And Washington state has implemented a limited license legal technician program in 2012.

The task force’s proposed amendments to the rules would not only allow licensed technicians but would also allow “technology-driven legal systems” to practice law. The task force made it a point to state that regulated entities that are permitted to practice law should not be limited or restrained by any concept or definition of artificial intelligence. This seems to suggest that artificial intelligence should be allowed to give legal advice once the technology is available and is properly regulated.

It appears that not many California lawyers know what’s going on. To my knowledge, the California Lawyers Association has not issued a statement about this. When I brought this up to colleagues, most did not know about this meeting. This is unsurprising since most solos and small-firm lawyers do not regularly check the California State Bar website. Most of us go to the state bar website for four reasons: to pay annual dues, look up opposing counsel, check if their law clerk, relative, or friend has been admitted to the bar, or to see who got disbarred and why.

If non-lawyers are allowed to practice, it is very likely to affect solo and small firms the most as they tend to serve the low-income/middle class market. The public will have little sympathy because they think that all lawyers are rich and greedy. What people don’t know is that self-employed lawyers — like any other business — have to pay bills and because of this, even the most frugal and selfless attorney can only reduce their prices by so much. This includes office overhead, staff, online research access, and bar dues. And lawyers usually pay more these things than others because again, everyone thinks lawyers are rich. And most lawyers have to pay nondischargeable student loans where balances seem to increase with every graduating class.
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ICAP website: www.icaponline.org
Proponents of alternative business structures or technology-driven legal systems argue that they are trying to service those who cannot afford an attorney. But I’m sure they wouldn’t mind accessing a much bigger consumer market: those who can afford an attorney but don’t want to pay for one. If the task force’s proposals pass, I question whether this will result in limited license non-lawyers opening up shop in remote parts of California. Instead, it will open the door for venture-capital-funded startups to set up AI powered legal self-help websites. People can access these sites with their legal questions or issues and artificial intelligence will provide the answers and probably the documents as well.

Or this can result in the creation of “Uberlaw” where a website connects the client with the attorney. But the website will set the price and the terms of the attorney-client relationship. And if the client gives the attorney less than five stars, the lawyer can be removed. Meanwhile, the lawyer will still be responsible for her overhead and will be responsible if something goes wrong.

The proposals can affect the big players as well. The Big 4 accounting firms would love to enter the legal market so they can service their existing Fortune 500 clientele. Their tax departments already hire lawyers for consulting and compliance work. This might be of particular interest to Arthur Andersen. Yes, that Arthur Andersen who had a major role in the Enron scandal although I think their current staff had nothing to do with it. They are now trying to revive the brand by promoting their legal advising services.

Finally, despite assurances of regulation, there may be some who will use this opportunity to scam the public. A well known example is the notario, a nonlawyer who offers legal services in Hispanic community. Hispanic immigrants confuse them with “notario publico,” a person with extensive legal training in most Latin American countries. The California State Bar has warned immigrants to be careful when dealing with unlicensed notaries. Also, during the housing crisis, nonlawyers set up loan modification shops. They promised customers that they can save their homes from foreclosure and can set up loan modification agreements where the principal is reduced. The nonlawyers owners of these companies hired lawyers (usually new graduates) to negotiate with the banks. Most of these shops were shut down and the lawyers involved had their licenses suspended or were disbarred.

The task force’s proposals to expand who is allowed to practice law in California is something that every lawyer should know about. The California State Bar Board of Trustees will meet on July 11, 2019, to review these proposals and they will invite public comment for 60 days. It should not be ignored thinking that it will go away if nobody cares. Even if you don’t live in California, you might want to keep an eye on this because your state might be next. I’m looking at New York in particular. This can result in non-lawyers owners telling the lawyers how to do their job which was the main concern when the ABA prohibited fee-splitting and nonlawyer ownership. Also, most trench lawyers know firsthand how some of their clients have been hurt because they turned to unqualified people. Their stories must be told as a warning.
THANK YOU TO
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Based in **Corona**, with offices in **Fresno** and **San Diego**, **McMahon Lynch Law Firm, Inc.**, represents individuals, institutions, corporations, and organizations throughout the State of California.


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Thank you to ICAP 2019 Educational Conference Speakers
Links to their respective presentations included

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Riverside Superior Court Commissioner Belinda Handy Family Law MCLE
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Attorney Jeffery Rosanswank
San Bernardino Public Defender’s Office Criminal Law MCLE
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Attorney Christopher Johnson Probate Law MCLE
https://sharesync.serverdata.net/us3/s/J7avceoI3tYe6Za8GS280y003d5bec

Stacey Lake Owner of Lawfecta & ICAP President Ethics MCLE
https://sharesync.serverdata.net/us3/s/q8uO1TY0SEShQvZhyOjElb003d5bec
NALA Certified Paralegal Exam

By: Dawn M. DuRocher, ACP, CAS, Board Advisor

The Certified Paralegal (CP) credential is key to respect and opportunity throughout the legal profession. The CP Certified Paralegal® program, which was established in 1976, has enabled the profession to develop a strong and responsive self-regulatory program offering a nationwide credential for paralegals. Following is a summary of the exam.

**Examination Specifications**
The Certifying Board approved a new structure for the Certified Paralegal examination effective January 2018.

**Examination Format**
The Certified Paralegal examination consists of two required sections taken in the following order:

- **Knowledge Exam**
  The Knowledge Exam consists of multiple choice questions covering the topic areas listed in Appendix A.
  The Knowledge Exam is administered on-demand, year-round at testing centers with preliminary result reporting upon completion.
  Candidates must successfully complete the Knowledge Exam in order to be eligible to take the Skills Exam.

- **Skills Exam**
  The Skills Exam consists of a written assignment; specifications are set forth in Appendix A.
  The Skills Exam is administered during four testing windows each year: February, April, July, and October.
  2 hours testing time is provided for the Skills Exam.

Successful completion of both the Knowledge and Skills Exams is required to obtain the Certified Paralegal credential.

**Examination Policies**

Administration – Knowledge Exam
120 items are included on each Knowledge Exam.
100 items are scored.
20 items are pretested for statistical analysis.
3 hours testing time (90 seconds per item) is provided for Knowledge Exams.

Result reporting is available upon completion with on-demand testing year-round.

Article Continued on page 21, Appendix “A” on page 22
Corporate Sponsorship

If you are a part of the local legal community or one of its service providers, ICAP invites you to become a Corporate Sponsor. If you are not familiar with ICAP, our mission statement and activities can be found on our website at www.icaponline.org.

As a Corporate Sponsor, you will increase your visibility within the community and be recognized for your support of this professional association. ICAP values the support of area law firms, legal service providers, and other companies that provide support to legal professionals in the Inland Empire.

For more information contact ICAP’s Corporate Sponsor Chair at corporatesponsor@icaponline.org.

Sustaining Members

Over the years law firms, schools and other entities who have an interest in ICAP and the paralegal profession have become Sustaining Members. The fee for a sustaining Member is $65 per year. We encourage our members to ask employers, schools, and others who may have an interest if they would like to become a Sustaining Member. Sustaining Members receive our newsletter and other mailings and are invited to all meetings.

If you have any questions about the Sustaining Members program, contact ICAP’s Sustaining Member Chair at sustainingmember@icaponline.org. (See Membership Benefits on page 2.)
# INLAND COUNTIES ASSOCIATION OF PARALEGALS (ICAP)

## MEMBERSHIP APPLICATION / STATUS CHANGE

- **New Member**
- **Renewing Member**
- **NALA Member**

### PERSONAL INFORMATION

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### EDUCATION

- **Specialty (if any)**
- **Paralegal School / Location**
- **College / Degree**
- **Graduation Date (cert rec’d/anticipated)**

May we publish the above information in our membership directory?  
- **Yes**
- **No**

How did you hear about ICAP:

- **I would like to receive the ICAP newsletter at my business address.**
- **I would like information on serving on a committee. Please indicate your area(s) of interest:**

  (This is not a requirement for membership.)

### MEMBERSHIP CATEGORIES

There are four categories of membership in ICAP described as follows:

- **Regular Member**: $65 annually. A regular member is a paralegal who fulfills the minimum qualifications for paralegals pursuant to Business and Professions Code § 6450, et seq. Only Regular Members of ICAP shall vote, and each Regular Member shall be entitled to cast only one (1) vote.

- **Associate Member**: $65 annually. Non-voting. An associate member is employed by a licensed attorney but has not achieved the minimum standards set for in Business and Professions Code § 6450, et seq.

- **Student Member**: $45 annually. Non-voting. A student member is a student currently enrolled in a paralegal certificate program.

- **Sustaining Member**: $65 annually. Non-voting. A sustaining member is any person, law firm, corporation, institution or entity interested in promoting the paralegal profession and supporting the goals of ICAP.

I hereby agree to be bound by NALA’s Code of Ethics and Professional Responsibility, and any other code so adopted by this Association. I further certify that I qualify for membership and meet the requirements of my chosen membership category.

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Return the application, together with your check made payable to ICAP to:

ICAP Membership • PO Box 143 • Riverside, CA 92502-0143

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**ICAP website**: [www.icaponline.org](http://www.icaponline.org)
Shauna M. Albright is the Founding and Managing Attorney at the Law Offices of Shauna M. Albright. The law firm exclusively practices Family law and has been serving the Inland Empire for 17 years. As a premiere law firm dedicated to our clients and community, we offer our clients small firm attention with big firm expertise. Because we exclusively practice Family Law in the Inland Empire, our attorneys and staff are knowledgeable and well versed in the field. This gives our clients the information and representation needed to resolve their cases efficiently and effectively. Contact our office today for more information and to schedule a consultation.
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□ PAST AND PRESENT □

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1996 Douglas Kershaw
1997 Renee Vargas
1998 Deborah Gilson
1999 Kathleen Dogendorf
2000 Kathleen Dogendorf
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2002 Christine Jacobs-Donoghue
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2008 Dawn M. DuRocher, ACP
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2010 Jeannie Cartabiano, CP
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2012 Jacqueline D. James, JD
2013 Connie S. Johnson
2014 Connie S. Johnson
2015 Gina Maple
2016 Connie S. Johnson
2017 Connie S. Johnson/
Gina Maple
2018 Gina Maple
2019 Stacey Lake

ICAPtions—Winter 2019

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Certification and Ethical Responsibility

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Stacy Lake

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ber benefit of ICAP. For further information about
all the benefits ICAP has to offer, please visit our
website at www.icaponline.org.
Exam Administration Policies and Procedures

Knowledge Exam
Candidates must first pass the Knowledge Exam. Candidates are eligible to take the Knowledge Exam only after they have graduated from an educational program, if using that eligibility pathway, or have the required minimum experience, if using the experience category. The new system of on-demand testing removes deadlines to apply for the examination. Candidates are able to apply when they are eligible.

Once NALA approves an application for the Certified Paralegal examination, candidates have 365 days from the approval date to sit for the Knowledge Exam. If the candidate does not take the Knowledge Exam within 365 days of the initial approval date, NALA will return the application to the candidate. The examination fee is nonrefundable.

Candidates who do not pass the Knowledge Exam must wait 90 days before re-taking it. Candidates must pass the Knowledge Exam within the first three attempts during the 365 day period or wait 365 days before trying again.

Skills Exam
Candidates who pass the Knowledge Exam are then eligible to take the Skills Exam and must complete the Skills Exam within the next 365 days after receiving notice of eligibility from NALA.

Candidates must wait at least 2 weeks after passing the Knowledge Exam before receiving eligibility to take the Skills Exam.

Candidates who do not pass the Skills Exam must wait 90 days before re-taking it. Candidates must pass the Skills Exam within the first three attempts in a 365 day period or start over by re-taking the Knowledge Exam.

Exam fees
First time candidates
Nonrefundable examination fee of $250 for NALA members, $275 for nonmembers. Includes one attempt for the Knowledge Exam and one attempt for the Skills exam.

Retake candidates
Nonrefundable attempt fee of $60 per subsequent attempt for the Knowledge Exam. Nonrefundable attempt fee of $60 per subsequent attempt for the Skills Exam.
<table>
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Inland Counties Association of Paralegals (ICAP)
Post Office Box 143
Riverside, California 92502-0143
www.icaponline.org

ICAP Mission Statement
To promote the paralegal profession in San Bernardino and Riverside Counties through the establishment of a network of professional paralegals to:

- Encourage greater utilization of paralegals within our legal communities.
- Promote continuing educational opportunities.
- Maintain a resource system for practicing and student paralegals.
- Build stronger relationships with the local Bar Associations.
- Maintain and promote California Alliance of Paralegal Associations' and National Association of Legal Assistants' paralegal standards and Codes of Ethics.

Important Dates and Events—2019

April 10th—CAPA GOAL noon webinar
April 17th—ICAP MCLE RCBA
April 27th—ICAP Paralegal Day at Goldy Lewis Community Center Park
May 8th—CAPA GOAL noon webinar
May 15th—ICAP MCLE webinar
June 12th—CAPA GOAL noon webinar
June 15th—CAPA Educational Conference San Francisco
July 10th—CAPA GOAL noon webinar
July 11th—13th—NALA Conference and Expo, Scottsdale, AZ
August 14th—CAPA GOAL webinar
September 11th—CAPA GOAL noon webinar
September 21st—ICAP Annual 1/2Day Educational Conference Temecula
October 9th—CAPA GOAL noon webinar
November 13th—CAPA GOAL noon webinar
December 7th—ICAP Annual Holiday Party

ICAP website: www.icaponline.org