

Legal Secretary Training and Experience Questionnaire

This Training and Experience (T&E) Questionnaire is the examination for the classification of Legal Secretary. The results of this examination will determine your placement on the hiring list for the classification should any open positions become available.

The assessment is a self-rating process. In the following pages, you will rate yourself on a series of statements designed to measure how your education, training, and work history has provided you the essential knowledge, skills, and abilities required to successfully perform in the Legal Secretary position.

The T&E Questionnaire is the sole component of the Legal Secretary examination. All instructions should be read carefully and understood before completing this examination. Failure to do so may result in an inability to process your T&E Questionnaire and/or disqualification from this examination. Please keep a copy of your completed questionnaire for your records.

Please print and submit the completed T&E Questionnaire along with your State Application as it is indicated on the examination bulletin.

If you have any questions regarding this questionnaire, please contact:

Examination and Recruitment Section
916-324-4807
boeexams@boe.ca.gov

HOW TO COMPLETE A TRAINING & EXPERIENCE QUESTIONNAIRE

What is a Training and Experience Questionnaire?

A Training and Experience (T&E) Questionnaire is a way to measure the previous experience, training, and/or education that a candidate has is relevant to the job for which the exam is being conducted.

These questionnaires typically consist of a series of statements that represent qualities important for successful job performance. You will be asked to rate yourself on the experience, training, and education that you will bring to the job.

This questionnaire is a scored component accounting for 100% of your rating in this examination. It is important to complete the questionnaire carefully and accurately. Your responses are subject to verification before appointment to a position.

Suggested Rating Techniques

Making judgments about your own level of skills or amount of experience can be a difficult task, but there are steps you can take to help increase the accuracy of your ratings.

- Read the questions and the responses carefully. Consider all your relevant training and experience.
- Be honest. Don't diminish your accomplishments or the amount of time that you have put into your career.
- Be truthful. Don't exaggerate what you have done. While it's common to want to present yourself to the best advantage, T&E Questionnaires are of most use when your ratings are accurate. Rating yourself higher in certain experiences or indicating that you have more training than you do in actuality isn't necessarily going to result in a higher score. Often candidates' responses are confirmed during the hiring interview.

INSTRUCTIONS

Respond to each of the following statements by indicating the applicable level of your education, training, and/or experience, as well as how the statement applies to you. You are required to respond to every statement by marking one option from the scale provided.

Item Rating Scale Levels:

EXPERT (4).

I possess an expert level to the extent that I could effectively perform the most difficult and complex attributes of this statement with little or no training and I could instruct others on specific aspects of the position.

ADVANCED (3).

I possess an advanced level to the extent that I could effectively perform the attributes of this statement with some training and handle the majority of circumstances or situations encountered.

SUFFICIENT (2).

I possess a sufficient level to the extent that I could perform the attributes of this statement, but may require additional instruction/training to apply my knowledge effectively.

SOME (1).

I possess some level of this area and will need some instruction and training to perform the attributes of this statement.

NONE (0).

I do not possess any knowledge, skill, or ability of this area and will need instruction and training to perform the attributes of this statement.

Using the drop down box which contains the Item Rating Scale values, select the corresponding level of your education, training, and/or experience relevant to the statement.

Expert (4).
Advanced (3).
Sufficient (2).
Some (1).
None (0).

Use and understand computer software (e.g., word processing, case management, document management, etc.) to produce legal documents in compliance with state and federal court rules.

Skill to operate a personal computer in order to perform daily secretarial duties.

Typing legal documents (e.g., pleadings, correspondence) to give to attorneys for review and/or changes.

Knowledge of how to prepare a large variety of legal forms and documents (internal memos, summaries of facts, narrative reports, etc.) for filing and service.

Ability to review, edit and evaluate written documents for accuracy and completeness to produce quality products.

Knowledge of proper spelling, grammar, punctuation, and sentence structure of the English language to ensure that prepared and/or reviewed written materials are complete, and free of writing errors.

Read and comprehend written documents.

Proofread legal documents to ensure that they are grammatically correct and properly formatted according to the rules of English grammar and legal requirements.

Utilize the California Style Manual to ensure proper formatting of case citations.

Review data and situations accurately in order to determine and implement effective appropriate courses of action.

Knowledge of how to prepare the most common types of legal documents in an effective manner (e.g., briefs, motions, pleadings), including how to apply rules regarding content, citations, order of presentation, formatting, and page limitations.

Accurately transcribe information from various sources (e.g. handwritten drafts, dictation machine) to relay information to attorneys and/or other parties.

Keep work area organized to complete job assignments in a timely manner.

Digitally scan and electronically send documents.

Creating electronic case files on the computer with pertinent sub folders to organize types of documents prepared for each case.

Using the drop down box which contains the Item Rating Scale values, select the corresponding level of your education, training, and/or experience relevant to the statement.

Expert (4).
Advanced (3).
Sufficient (2).
Some (1).
None (0).

Knowledge of proper filing techniques to create and maintain an organized series of necessary files of varying types to store and retrieve hardcopy/electronic information.

Preparing labels for legal files with case name, case number, and name of documents (e.g., pleading, correspondence, discovery) to distinguish between the different file types.

Organize exhibits and attachments within a case using a labeling or tab system pursuant to the instructions of the attorney and/or rules of court.

Knowledge of legal terminology reflected in pleadings, briefs, interrogatories, and other documents.

Knowledge of legal procedures and practices.

Communicate with professional, supervisory, and clerical staff to ensure the rapid dissemination of information using e-mail and verbal methods while maintaining accuracy and a professional manner.

Present ideas and information effectively to various entities (e.g. employees, management, etc.) in order to communicate and meet operational needs.

Use discretion and diplomacy when responding orally and in writing to the needs and concerns of others.

Ability to understand oral instructions containing complex and technical information.

Interacting with courts, administrative agencies, governmental entities, co-counsels, opposing counsels, or witnesses as directed by the attorney ensuring deadlines are met, to set hearing dates or check on filings.

Work efficiently to complete urgent projects while maintaining a high quality of work.

Manage multiple cases while tracking deadlines and case requirements.

Ability to be flexible in adapting to changes in priorities, assignments, and other interruptions that may impact pre-established timelines for completing assignments.

Scheduling and making appointments (e.g., booking rooms, email invitations, acquiring parking permits) on behalf of attorneys.

Scheduling depositions with opposing counsel, and arranging various necessities (e.g., court reporter, interpreter, videographer, deposition room, required fees).