



DEPARTMENT OF CONSUMER AFFAIRS  
**COURT REPORTERS  
BOARD OF CALIFORNIA**

2535 Capitol Oaks Drive, Suite 230, Sacramento, CA 95833  
Phone (916) 263-3660 / Toll Free: 1-877-327-5272  
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## MEETING OF THE COURT REPORTERS BOARD

**Friday, August 21, 2026  
9:00 a.m. to close of business**

The Court Reporters Board will hold a public meeting in-person and via a WebEx platform.

**Department of Consumer Affairs  
HQ2 Hearing Room  
1747 North Market Boulevard  
Sacramento, CA 95834**

**Important Notices to the Public: The Court Reporters Board will hold a public meeting via a teleconference platform pursuant to Government Code, § [11123.2](#).**

**INSTRUCTIONS FOR PARTICIPATION:** Please see the Webex Instructions posted on the Board's meeting calendar to observe and participate in the meeting using WebEx.

Members of the public may, but are not obligated to, provide their names or personal information when observing or participating in the meeting. When signing into the WebEx platform, participants may be asked for their name and email address. Participants who choose not to provide their names will be required to provide a unique identifier such as their initials or another alternative, so that the meeting moderator can identify individuals who wish to make public comment. Participants who choose not to provide their email address may utilize a fictitious email address in the following sample format: XXXXX@mailinator.com.

**If Joining by Computer:**

Click [here](#) to join the Webex meeting

Webinar number: 2491 190 9999

Webinar password: CRB821

**If Joining by Phone:**

Audio conference: US Toll 1-415-655-0001

Access code: 2491 190 9999

Passcode: 27821

To observe the meeting without making public comment (provided no unforeseen technical difficulties), please visit: [thedcapage.blog/webcasts/](http://thedcapage.blog/webcasts/)

Please note the Board may ask members of the public to limit their comments to three minutes, unless, at the discretion of the Board, circumstances require a shorter period; the Board will advise when the three-minute time limit is approaching.



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## MEETING OF THE COURT REPORTERS BOARD

**Friday, August 21, 2026**  
**9:00 a.m. to close of business**

### AGENDA

**Board Members:** Denise Tugade, Chair; Michael Dodge-Nam, Vice Chair;  
 Heatherlynn Gonzalez; Arteen Mnayan; Alison Saltonstall.

**Action may be taken on any item on the agenda.**

**CALL TO ORDER, ROLL CALL AND ESTABLISHMENT OF A QUORUM** – Denise Tugade, Chair

1. PUBLIC COMMENT FOR ITEMS NOT ON THE AGENDA ..... 5  
 The Board may not discuss or take any action on any item raised during this public comment section, except to decide whether to place the matter on the agenda of a future meeting (Government Code, §§ [11125](#), [11125.7\(a\)](#)).
2. REVIEW AND POSSIBLE ACTION TO APPROVE THE OCTOBER 17, 2025, MEETING MINUTES ..... 6
3. DEPARTMENT OF CONSUMER AFFAIRS UPDATE ..... 20
4. REPORT OF THE EXECUTIVE OFFICER ..... 21
  - 4.1 Transcript Reimbursement Fund status
  - 4.2 Enforcement Activity status and statistics
  - 4.3 License Exam statistics
  - 4.4 Family Violence Appellate Project v. Superior Courts Cal. Supreme Court No. S288176 status
  - 4.5 CRB Budget Report
5. POSSIBLE FEE INCREASE ..... 36  
 Review of fund conditions for discussion and possible action to initiate options the Board may have regarding license fee increase.
6. LEGISLATION ..... 38  
 Discussion and possible action to take a position on the following:
  - 6.1 [AB 667](#) (Solache) Professions and vocations: license examinations: interpreters
  - 6.2 [AB 882](#) (Papan) Electronic court reporting.

- 6.3 [AB 1767](#) (Berman) Department of Consumer Affairs: public members of boards: conflicts of interest.
- 6.4 [AB 1775](#) (Ward) Veterans.
- 6.5 [AB 2290](#) (Lackey) – Civil discovery: oral depositions: transcriptions
- 6.6 [AB 2783](#) (Assembly Judiciary, Chair Kalra) – Court reporting.

The Board may discuss other items of legislation not listed here in sufficient detail to determine whether such items should be on a future Board meeting agenda and/or whether to hold a special meeting of the Board to discuss such items pursuant to Government Code, § [11125.4](#).

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|-----|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----|
| 7.  | <u>REGULATIONS</u> .....                                                                                                                                                                                                                                                                    | 40  |
| 7.1 | Title 16, Section 2472 – Disciplinary Guidelines Publication Text<br>Discussion and possible action.                                                                                                                                                                                        |     |
| 7.2 | Title 16, Section 2410 (2452) – Transcript Reimbursement Fund Application and<br>Applicant Privacy<br>Discussion and possible action.                                                                                                                                                       |     |
| 7.3 | Title 16, Sections 2412, 2418, 2420, 2431-2436 – Examinations and Applications<br>Discussion and possible action.                                                                                                                                                                           |     |
| 8.  | <u>SKILLS EXAMINATION GRADING POLICIES</u> .....                                                                                                                                                                                                                                            | 91  |
|     | Discussion and possible action to approve graders' recommendations.                                                                                                                                                                                                                         |     |
| 9.  | <u>COURT REPORTER WORKFORCE DEVELOPMENT AND PIPELINE</u> .....                                                                                                                                                                                                                              | 96  |
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|     | Discussion and possible action to initiate corrective measures regarding reported<br>educational deficits of newly licensed reporters, specifically as relates to the requirements<br>set forth in California Code of Regulations, Title 16, Division 24, Article 2, section<br>2411(h)(2). |     |
| 11. | <u>CREDENTIALING TASK FORCE</u> .....                                                                                                                                                                                                                                                       | 103 |
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| 15. | <u>CLOSED SESSION</u> .....                                                                                                                                                                                                                                                                 | 112 |
|     | Pursuant to Government Code, § <a href="#">11126(c)(3)</a> , the Board will convene into closed session as<br>needed to discuss or act on disciplinary matters.                                                                                                                             |     |

## ADJOURNMENT

Action may be taken on any item on the agenda. Items may be taken out of order or held over to a subsequent meeting, for convenience, to accommodate speakers, or to maintain a quorum. Meetings are open to the public except when specifically noticed otherwise, in accordance with the Open Meeting Act. Members of the public are not required to submit their name or other information to attend the meeting.

Please note the Board may ask members of the public to limit their comments to three minutes, unless, at the discretion of the Board, circumstances require a shorter period; the Board will advise when the three-minute time limit is approaching.

The meeting is accessible to the physically disabled. A person who would like more information about the meeting or who wants to request a disability accommodation or modification to participate in the meeting may contact the board using the information listed below. Providing your request at least five (5) business days before the meeting will help to ensure availability of the requested accommodation.

To receive a copy of the supporting documents for the items on the agenda, please contact the Board within 10 days of the meeting or visit the Board's Calendar under "Quick Hits" at [www.courtreportersboard.ca.gov](http://www.courtreportersboard.ca.gov).

Contact Person: Paula Bruning  
2535 Capitol Oaks Drive, Suite 230, Sacramento CA 95833  
(877) 327-5272  
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COURT REPORTERS BOARD MEETING – AUGUST 21, 2026

**AGENDA ITEM 1 – Public Comment for Items Not on the Agenda**

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Public members are encouraged to provide their name and organization (if any).

The Board may not discuss or take any action on any item raised during this public comment section, except to decide whether to place the matter on the agenda of a future meeting.

COURT REPORTERS BOARD MEETING – AUGUST 21, 2026

**AGENDA ITEM 2 – Review and Approval of Meeting Minutes**

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Agenda Description:

Review and approval of October 17, 2025, minutes

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Brief Summary:

The Board met on October 17, 2025, and minutes of that meeting are before the Board for consideration and approval.

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Support Documents:

Attachment – Draft minutes for October 17, 2025

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Fiscal Impact:   None

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Recommended Board Action: Staff recommends the Board approve minutes.

Proposed Motion: I move to approve (as amended) the minutes of the October 17, 2025, meeting.



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Fax (916) 263-3664 / [www.courtreportersboard.ca.gov](http://www.courtreportersboard.ca.gov)**DRAFT****COURT REPORTERS BOARD OF CALIFORNIA  
MINUTES OF OPEN SESSION  
OCTOBER 17, 2025**Attachment  
Agenda Item 2CALL TO ORDER

Ms. Denise Tugade, chair, called the meeting to order at 11:16 a.m. The public meeting was held at Buena Vista Branch Library, 300 North Buena Vista Street, Burbank, CA 91505 and via a teleconference platform.

ROLL CALL

Board Members Present: Denise Tugade, Public Member, Chair  
Michael Dodge-Nam, Public Member  
Heatherlynn Gonzalez, Licensee Member  
Arteen Mnayan, Public Member  
Alison Saltonstall, Licensee Member

Staff Members Present: Yvonne K. Fenner, Executive Officer  
Helen Geoffroy, Board Counsel  
Steven Vong, Regulations Counsel  
Paula Bruning, Executive Analyst

Board staff established the presence of a quorum. Mr. Dodge-Nam was noted as absent.

1. PUBLIC COMMENT FOR ITEMS NOT ON THE AGENDA

Cindy Vega, President of Deposition Reporters Association of California (CalDRA), shared that she had heard of complaints from judges and attorneys that new reporters are not up to par for the job. She indicated that reporters who enter California CSR licensure through methods other than the traditional recognized court reporter program completion process are not required to complete apprenticeship hours. This includes many new voice writer licensees qualifying through CVR reciprocity. She views apprenticeship hours as important and necessary for all new CSRs.

Austin McDaniel, Chief Operating Officer of McDaniel Reporting, requested the Board consider for a future meeting a discussion of the role a Reporter in Charge (RIC) may play with regard to following Code of Civil Procedure (CCP) 2025.320(a) and California Code of Regulations, Title 16, Section 2474, specifically that testimony should be stenographically reported and that CSRs may not certify any transcript that they did not personally take down.

Mr. Dodge-Nam joined the meeting at 11:24 a.m.

Lindsay Stoker, CSR, and Dora Enriquez, CSR, shared that the firm for which they work would hold a webinar to distribute information on its operational plans and to answer questions.

Mary Pierce, CSR, expressed appreciation to Members Saltonstall and Gonzalez for taking on their new roles as licensee Board members.

## 2. WELCOME NEW BOARD MEMBERS

Ms. Tugade welcomed the two new licensee Board members.

Ms. Tugade first welcomed Member Heatherlynn Gonzalez of Los Angeles, who was appointed by Governor Newsom. Ms. Gonzalez has been a certified shorthand reporter since 2011 and is a member of CalDRA. She earned a Bachelor of Arts in Theater Arts and Communication/Music Composition and Theory from Whittier College. Ms. Gonzalez has worked with staff in many capacities including acting as one of the readers for the skills exam.

Next, Ms. Tugade welcomed Member Alison Saltonstall of Citrus Heights, who was also appointed by Governor Newsom. Ms. Saltonstall has been an official court reporter for Sacramento Superior Court since 2017. She has served on the United Public Employees' union board for six years, representing the Court Reporters' Unit and is currently the president of the Sacramento Official Court Reporters Association.

Ms. Tugade called for public comment.

Cindy Tachell, on behalf of the California Court Reporters Association, welcomed the new Board members.

Ms. Vega, on behalf of CalDRA, thanked Ms. Gonzalez and Ms. Saltonstall for taking on the roles.

## 3. RESOLUTIONS FOR OUTGOING BOARD MEMBERS

### 3.1 Robin Sunkees

Ms. Tugade read aloud the resolution prepared for Ms. Sunkees found on page 8 of the Board agenda packet.

Mr. Dodge-Nam thanked Ms. Sunkees for welcoming him to the Board and setting an exemplary example for him to follow. Mr. Mnayan agreed, adding that Ms. Sunkees helped him understand the true meaning of serving on the Board.

Ms. Tugade thanked Ms. Sunkees for everything she accomplished and her dedication to leading the profession. She has been a joy to work with.

Ms. Fenner expressed her appreciation for the privilege of serving as executive officer under Ms. Sunkees. She first had the honor of serving with Ms. Sunkees on the CCRA board where she came to respect her passion for the industry and commitment



to getting things done. She thanked Ms. Sunkees for always being incredibly responsive to Board staff in her role as Board chair and for having served the consumers of California.

Ms. Tugade called for public comment.

Ms. Tachell, CCRA, echoed the resolution and comments of Board members.

Ms. Vega, CalDRA, thanked Ms. Sunkees for her excellent service.

Michelle Caldwell, CCRA President, thanked Ms. Sunkees for the years of service to the profession.

Ms. Pierce thanked both Ms. Sunkees and Ms. Brewer for the work on the Board.

Ana Costa expressed appreciation for the work Ms. Sunkees and Ms. Brewer accomplished on the Best Practice Pointers Task Force.

*Mr. Dodge-Nam moved to adopt the resolution for Robin Sunkees. Mr. Mnayan seconded the motion.* Ms. Tugade called for public comment. No comments were offered. A vote was conducted by roll call.

For: Mr. Dodge-Nam, Ms. Gonzalez, Mr. Mnayan, Ms. Saltonstall, and Ms. Tugade

Opposed: None

Absent: None

Abstain: None

Recusal: None

### ***MOTION CARRIED***

Ms. Sunkees thanked everyone for the kind words and the resolution. She was very touched by the sentiments offered. She thanked the Board members and Ms. Fenner for serving alongside her.

## **3.2 Laura Brewer**

Ms. Tugade read aloud the resolution prepared for Ms. Brewer found on page 9 of the Board agenda packet.

*Mr. Dodge-Nam moved to adopt the resolution for Laura Brewer. Mr. Mnayan seconded the motion.* Ms. Tugade called for Board and public comment.

Mr. Dodge-Nam thanked Ms. Brew for also warmly welcoming him to the Board and leading by example with humility.

Mr. Mnayan expressed that Ms. Brewer would be sorely missed, particularly her meticulous nature and excellence in performance. He thanked her for her service to the community. Ms. Tugade echoed the expressions of appreciation for Ms. Brewer's attention to detail, adding that she has been a joy to work with.

Ms. Fenner shared that she first met this icon of the industry when Ms. Brewer agreed to be a guest speaker for a local association. Her knowledge of reporting was shadowed only by her grace and charm. She thanked Ms. Brewer for the honor of serving as her executive officer and for sharing her experience and expertise with the Board as a benefit to the consumers of California.

Ms. Tachell, CCRA, supported the resolution and echoed the comments of the Board members. She thanked Ms. Brewer for her years of service to the industry.

Ms. Vego, CalDRA, also thanked Ms. Brewer.

Ms. Caldwell, CCRA, stated that it was a pleasure working with Ms. Brewer.

Ms. Costa thanked Ms. Brewer for her invaluable wordsmithing during Board and task force meetings.

A vote was conducted by roll call.

For: Mr. Dodge-Nam, Ms. Gonzalez, Mr. Mnayan, Ms. Saltonstall, and Ms. Tugade  
Opposed: None  
Absent: None  
Abstain: None  
Recusal: None

#### ***MOTION CARRIED***

Ms. Brewer expressed her appreciation for having had the opportunity to work with Ms. Sunkees, the Board members, Ms. Fenner, and Board staff. She mentioned that she was able to check a box on her list of goals by serving as a member.

#### **4. REVIEW AND APPROVAL MAY 9, 2025, MEETING MINUTES**

*Mr. Dodge-Nam moved to approve the minutes as presented. Mr. Mnayan seconded the motion.* Ms. Tugade called for public comment. No comments were offered. A vote was conducted by roll call.

For: Mr. Dodge-Nam, Ms. Gonzalez, Mr. Mnayan, and Ms. Tugade  
Opposed: None  
Absent: None  
Abstain: Ms. Saltonstall  
Recusal: None

#### ***MOTION CARRIED***

## 5. DEPARTMENT OF CONSUMER AFFAIRS UPDATE

Arthur Babakhanyan with the Department of Consumer Affairs (Department/DCA) provided a Department update.

Mr. Babakhanyan indicated that Lucy Saldivar had been appointed as Deputy Director of Board and Bureau Relations (BBR). Additionally, Shelly Jones was appointed as the Assistant Deputy Director of BBR.

He reported that a session of Board Member Orientation Training (BMOT) would be held October 22, 2025. Dates for BMOT sessions for 2026 were being developed and would be announced soon.

He thanked staff for their efforts and contributions to the annual report, which includes a comprehensive report of information and statistical data about the Department's actions to submit to the Legislature.

Mr. Babakhanyan shared tips to remain cyber safe as information security is the responsibility of all.

Ms. Tugade called for public comment. No comments were offered.

***The Board took a break at 12:10 p.m. and returned to open session at 12:26 p.m. Board staff established the presence of a quorum by roll call.***

## 6. REPORT OF THE EXECUTIVE OFFICER

### 6.1 CRB Budget Report

Ms. Fenner provided a review of the Board's budget and referred the Board to page 28 of the Board agenda packet for the expenditure projections for Fiscal Month 13, which is the final report for Fiscal Year (FY) 2024/25. She indicated the Board was very close to breaking even, having only reverted back .18 percent.

Ms. Fenner shared that a corrected CRB fund condition report was issued after the production of the meeting materials and would be posted to the Board website. A slide of the updated report was shared during the meeting. She indicated that the updated fund condition shows no transfers to the TRF as the last of the 2021 General Fund grant is being used. Moving forward, transfers of \$150,000 annually were projected.

### 6.2 Transcript Reimbursement Fund

Ms. Bruning indicated that in FY 2024/25 over \$25,800 was paid for pro per applicants with an additional \$78,000 in provisionally approved applications awaiting final invoices. Thus far for FY 2025/26, over \$30,000 had been provisionally approved for pro per applicants. She commented that staff receives a large volume of interest via phone and email regarding the pro per pathway of the TRF. Since the TRF began

processing applications for pro per litigants in 2011, more than \$400,000 had been paid on behalf of those litigants.

She reported that the TRF paid more than \$20,000 for pro bono cases so far for FY 2025/26.

### 6.3 Enforcement Activities

Ms. Fenner referred to the enforcement statistics starting on page 31 of the Board agenda packet. The reports included the final FY 2024/25 report as well as statistics for the first two months of FY 2025/26.

### 6.4 License Exam

Ms. Fenner indicated that the overall exam statistics began on page 41 of the Board agenda packet starting with the comparison of the steno and voice writer skills portion of the exam. The historical results for all three exams follow, beginning on page 42.

Ms. Fenner reported that 113 candidates took the most recent skills exam of which 66 were first-time candidates. The next skills exam would be November 1 - 22, 2025. There are 108 candidates registered to take the November exam.

As of October 14, 2025, there were 332 voice writers including 28 that are certified in both steno and voice writing. Of the licensed voice writers, 144 were licensed via the reciprocity agreement with the National Verbatim Reporters Association (NVRA).

Ms. Fenner reported that 169 court reporting firms (CRF) have an active registration.

Mr. Dodge-Nam drew attention to the positive increase in the number of candidates passing the exam over the past five years.

### 6.5 Family Violence Appellate Project v. Superior Courts Cal. Supreme Court No. S288176

Ms. Fenner updated that Board on California Supreme Court case Family Violence Appellate project vs. Superior Courts of California (S288176). The case presents the following issue: Does the prohibition on electronic recording of certain proceedings in Government Code section 69957(a) violate the California Constitution when an official court reporter is unavailable and a litigant cannot afford to pay a private court reporter?

Ms. Fenner reported at the last meeting of the Board that the Supreme Court ordered the Respondents and the Legislature to show cause why the relief sought in the petition should not be granted. There have been several briefs filed but no decision yet. Board staff will continue to follow the case as it will have lasting effects for California litigants.

Ms. Tugade called for public comment. No comments were offered.

## 7. LEGISLATION

Ms. Fenner provided a report regarding the bills the Board is tracking. Information pertaining to the bills could be found beginning on page 48 of the Board agenda packet.

- 7.1 AB 479 (Tangipa) – This bill failed passage. There was no discussion on this item.
- 7.2 AB 711 (Chen) – This bill was chaptered and requires notice to other parties if one side is hiring a court reporter. The intent appears to be to help with multiple reporters showing up for the same proceeding causing a strain on court reporting services. The Board had taken a formal position of SUPPORT on this bill at a previous meeting.
- 7.3 AB 742 (Elhawary) – This bill was chaptered and will give priority to applications submitted by descendants of slaves. There was no discussion on this item.
- 7.4 AB 882 (Papan) – This bill failed passage. There was no discussion on this item.
- 7.5 AB 1170 (Dixon) – This codes maintenance bill was chaptered but does not affect the Board. There was no discussion on this item.
- 7.6 AB 1189 (Lackey) – This bill failed passage.

After publication of the Board agenda materials, an article was published in The Center Square on October 10, 2025, reporting that Assemblymember Lackey is pursuing AB 1189. The legislation would create a certification process for digital court reporters and legal transcriptionists who produce transcripts from the digital audio recordings. Discussion was deferred pending publication of bill language.

- 7.7 AB 1298 (Harabedian) – This is a spot bill regarding DCA. There was no discussion on this item.
- 7.8 SB 470 (Laird) – This bill was chaptered and extends the current Bagley-Keene Open Meeting Act requirements to January 1, 2030. The Board had taken a formal position of SUPPORT on this bill at a previous meeting.
- 7.9 SB 806 (Dahle) – This is a spot bill regarding DCA. There was no discussion on this item.
- 7.10 SB 861 (Ashby – Chair) – This is the BP&ED Committee's omnibus bill. The bill contains a provision to bring the school qualifier examinations into alignment with the changes made by the Legislature to the pass rate for the Board's skills exam (95% accuracy). The bill was enrolled on September 18, 2025, and is awaiting the Governor's signature. The Board had taken a formal position of SUPPORT on this bill at a previous meeting.

## 7.11 Consider and vote on proposed legislative initiatives for next legislative session.

### 7.11.1 Reciprocity with the National Court Reporters Association's RPR Exam

Ms. Tugade presented the proposed legislative language starting on page 52 of the Board agenda packet.

Ms. Fenner stated that at its May 9, 2025, meeting, the Board voted to allow reciprocity with the NCRA RPR skills exam. At that time, it was too late in the legislative cycle to find an author. Staff recommends approval of the proposed language so staff may seek an author.

*Mr. Mnayan moved to approve for the next legislative session the proposed legislative language establishing reciprocity between the skills portion of the California CSR exam and RPR skills exam. Mr. Dodge-Nam seconded the motion.* Ms. Tugade called for public comment. No comments were offered. A vote was conducted by roll call.

For: Mr. Dodge-Nam, Ms. Gonzalez, Mr. Mnayan, Ms. Saltonstall, and  
Ms. Tugade

Opposed: None

Absent: None

Abstain: None

Recusal: None

### ***MOTION CARRIED***

### 7.11.2 Skills Exam Format Change

Ms. Fenner presented proposed legislative language starting on page 54 of the Board agenda packet. The proposal would move the Board's skill exam format into alignment with the NCRA RPR skills exam.

*Mr. Dodge-Nam moved to approve for the next legislative session the proposed legislative language changing the license skills exam format from four-voice at 200 words per minute for 15 minutes to the universal format of three five-minute tests consisting of literary material at 180 words per minute, jury charge material at 200 words per minute, and two-voice testimony at 225 words per minute. Mr. Mnayan seconded the motion.* Ms. Tugade called for public comment.

Ms. Tachell, CCRA, inquired if the Board had researched how long it would take the court reporting schools to revise their programs to align with a change to the exam format.

Ms. Caldwell, CCRA, asserted that is important to involve the schools in discussions about how changes to the exam will impact the programs and the students.

Ms. Fenner stated that the schools will be impacted; however, it will not be an overnight change. Legislation will need to be passed before the schools can make changes. The Board will work to help the schools and possibly accommodate candidates with both formats until everyone has had an opportunity to make the transition.

A vote was conducted by roll call.

For: Mr. Dodge-Nam, Ms. Gonzalez, Mr. Mnayan, Ms. Saltonstall, and Ms. Tugade

Opposed: None

Absent: None

Abstain: None

Recusal: None

### ***MOTION CARRIED***

## **8. REGULATIONS**

### **Title 16, Section 2472 – Disciplinary Guidelines Publication Text**

Mr. Vong updated the Board on the rulemaking package. Information was also included starting on page 61 of the Board agenda packet.

Mr. Vong reported that the regulation section concerns disciplinary and denial guidelines which set forth recommended discipline for violations of the Board's statutes and regulations. The regulation was last updated through the Office of Administrative Law (OAL) in 1989. In May 2025, the Board voted to approve updates. Since that time, Board and legal staff re-reviewed and found the need for substantive updates including clarifications in the actual text of the CA Code of Regulations and on the incorporated document itself to address consistency as suggested by Board Member Brewer.

Mr. Vong stated that the following amendments to the document itself are suggested:

- Page 3 – footnote notation after the first use of “recent” stating: For the purposes of these guidelines, recent means within 60 calendar days, preferably within 30 calendar days.
- Page 21 – Respondent shall not practice until proof of correction, for example, a screenshot of website or print copy, has been submitted to the Board or its designee by mail, email, or in person, and the Board or its designee has notified Respondent in writing that they may resume practice in writing by mail or email within 30 calendar days after the date of Respondent's submission of proof.

Mr. Vong stated that the rest of the edits are highlighted in the meeting materials. He indicated that staff recommends the Board review and approve the draft regulatory language and instruct staff to proceed with the rulemaking process, and he read the proposed motion.

*Mr. Dodge-Nam moved that the Board rescind its previous May 9, 2025, motion and approve the changes to CCR section 2472 and the newly proposed regulatory text of the Disciplinary and Denial Guidelines publication, with amendments to add on page 3 after “recent,” a footnote – “For the purposes of these guidelines, ‘recent’ means within 60 calendar days, preferably within 30 calendar days.” – and on page 21, “Respondent shall not practice until proof of correction, for example, a screenshot of website or print copy, has been submitted to the Board or its designee by mail, email, or in person, and the Board or its designee has notified Respondent in writing that they may resume practice in writing by mail or email within 30 calendar days after the date of Respondent’s submission of proof,” and direct staff to submit all approved text to the director of the Department of Consumer Affairs and the Business, Consumer Services, and Housing Agency for review. If no adverse comments are received, authorize the executive officer to take all steps necessary to initiate the rulemaking process, make any non-substantive changes to the package, and set the matter for hearing if requested. If no adverse comments are received during the 45-day comment period and no hearing is requested, authorize the executive officer to take all steps necessary to complete the rulemaking and adopt the proposed regulations for CCR section 2472 as noticed, with the authority to make any technical or non-substantive changes. Ms. Gonzalez seconded the motion. Ms. Tugade called for public comment.*

Cindy Vega, Deposition Reporters Association of California, inquired when the guidelines were last approved. Mr. Vong informed her that the guidelines were last approved by OAL in 1989.

A vote was conducted by roll call.

For: Mr. Dodge-Nam, Ms. Gonzalez, Mr. Mnayan, Ms. Saltonstall, and Ms. Tugade  
Opposed: None  
Absent: None  
Abstain: None  
Recusal: None

MOTION CARRIED

## 9. COURT REPORTING AND CAPTIONING WEEK

Ms. Fenner reported that staff has been approached by a representative of the Deposition Reporters Association to enlist help in requesting the Governor’s Office to proclaim February 7-14, 2026, as “Court Reporting and Captioning Week.” Staff is working with its legislative analyst to ascertain the process for that request. The item is before the Board to discuss and instruct staff whether to move forward with the request.

The Board directed staff to move forward with the request.

## 10. NEW BOARD LOGO

Mr. Dodge-Nam stated that Board’s outdated logo includes representation of a steno machine and, therefore, requires updating to be inclusive of voice writers. He, along with Board staff, worked with the DCA Office of Publication, Design, and Editing to develop inclusive designs that are modern and timeless, using the Board’s existing color palette.



Mr. Dodge-Nam presented the Board with three possible logos for selection starting on page 93 of the Board agenda packet.

Ms. Gonzalez shared appreciation for all three designs but really liked Option 1, which showed CRB along with its licensees as the pillars of the justice system. Mr. Mnayan and Ms. Tugade agreed and thanked Mr. Dodge-Nam for his efforts.

Ms. Saltonstall agreed with Option 1 but also liked Option 3. She commented that all three options represent the Board perfectly.

*Mr. Mnayan moved to adopt Option 1 for the Board's new logo. Ms. Gonzalez seconded the motion.* Ms. Tugade called for public comment. No comments were offered. A vote was conducted by roll call.

For: Mr. Dodge-Nam, Ms. Gonzalez, Mr. Mnayan, Ms. Saltonstall, and Ms. Tugade

Opposed: None

Absent: None

Abstain: None

Recusal: None

### ***MOTION CARRIED***

#### **11. COURT REPORTER WORKFORCE DEVELOPMENT AND PIPELINE**

Ms. Tugade indicated that this is now included as a standing item on the agenda due to its incredible importance.

She indicated that at its May 9, 2025, meeting, the Board discussed solutions regarding expediting or removing barriers for credentialing instructors. She recommended that the Board adopt a task force to address the issue. Ms. Tugade appointed Ms. Gonzalez as the chair of the task force. Ms. Fenner invited anyone interested in volunteering as a member of the task force to contact staff who will in turn work with Ms. Gonzalez to appoint members of the task force.

#### **12. UNPROCTORED SKILLS EXAM TESTING**

Ms. Fenner reported that the National Court Reporters Association (NCRA) began to administer their online skills exams without the presence of a live proctor in January of 2024. Instead, tests are randomly reviewed for security issues. The Board discussed this issue at the July 2024 meeting, ultimately deciding to wait to see if NCRA encountered any issues. This item is back before the board as it has now been over a year since this change was implemented. Board staff reached out to NCRA staff and was informed that NCRA has experienced no negative issues since the change.

Although some candidates experience legitimate issues with the proctors, those issues are dealt with on a case-by-case basis and may result in the candidate being granted the ability to retest in the current cycle. Staff expressed concerns about the ability of the Board to administer a secure test without a live proctor. Additionally, staff pointed out the strong and rising exam pass rate, and they questioned the need to change to a non-proctored

environment. For those reasons, staff recommended continuing testing with the presence of proctors.

Ms. Gonzalez agreed with keeping the CSR exam proctored to avoid leaving the Board open to the possibility of abuse in the system. Mr. Dodge-Nam agreed that security of proctored exams should stay in place. Ms. Tugade also agreed, adding that she has concerns about ensuring the integrity of the Board's test.

Ms. Tugade called for public comment.

Ms. Vega, CalDRA, agreed that everyone needs to be proctored.

Ms. Pierce also agreed the tests should be proctored. She offered to send information to Board staff regarding some problems with the proctors in hopes of furthering proctor training.

Tara Ocana indicated that she brought the idea of non-proctored testing to the Board due to proctor problems, including privacy issues. She suggested the Board consider contracting with a different proctoring company.

Ms. Costa echoed the concerns regarding the proctors. She stated that proctors are accessing computer programs and files as well as appearing late to test appointments. She shared that the State Bar of California filed a lawsuit against ProctorU.

#### 13. 2024-2028 STRATEGIC PLAN

Ms. Fenner referred to the Action Plan Timeline starting on page 99 of the Board agenda packet. The timeline shows the actions achieved to date toward the Board's strategic plan objectives.

Ms. Gonzalez expressed interest in getting involved in accomplishing specific objectives.

Ms. Tugade called for public comment. No comments were offered.

#### 14. ELECTION OF OFFICERS

Ms. Tugade called for election of officers.

*Member Dodge-Nam nominated Ms. Tugade as chair. Mr. Mnayan seconded the motion.*

Ms. Tugade called for public comment. No comments were offered. A vote was conducted by roll call.

For: Mr. Dodge-Nam, Ms. Gonzalez, Mr. Mnayan, Ms. Saltonstall, and Ms. Tugade

Opposed: None

Absent: None

Abstain: None

Recusal: None

**MOTION CARRIED**

*Member Tugade nominated Mr. Dodge-Nam as vice-chair. Ms. Gonzalez seconded the motion. Ms. Tugade called for public comment. No comments were offered. A vote was conducted by roll call.*

For: Mr. Dodge-Nam, Ms. Gonzalez, Mr. Mnayan, Ms. Saltonstall, and Ms. Tugade  
Opposed: None  
Absent: None  
Abstain: None  
Recusal: None

***MOTION CARRIED***

15. FUTURE MEETING DATES

Ms. Tugade stated that staff would poll the Board members offline for calendar availability for the next meeting.

Ms. Tugade called for public comment. No comments were offered.

***The Board took a break at 1:28 p.m. and convened into closed session at 1:38 p.m.***

16. CLOSED SESSION

16.1 Pursuant to Government Code section 11126(c)(3), the Board met in closed session to discuss or act on disciplinary matters.

16.2 Pursuant to Government Code section 11126(a)(1), the Board met in closed session to conduct the annual evaluation of its executive officer.

***The Board returned to open session at 2:26 p.m.***

Ms. Tugade indicated that there was nothing to report from closed session.

ADJOURNMENT

Ms. Tugade adjourned the meeting at 2:26 p.m.

---

DENISE TUGADE, Board Chair

---

DATE

---

YVONNE K. FENNER, Executive Officer

---

DATE

COURT REPORTERS BOARD MEETING – AUGUST 21, 2026

**AGENDA ITEM 3 – Department of Consumer Affairs Update**

=====

Agenda Description: Report from the DCA Executive Office

=====

Support Documents: None

=====

Fiscal Impact: None

=====

Recommended Board Action: Informational.

COURT REPORTERS BOARD MEETING – AUGUST 21, 2026

**AGENDA ITEM 4 – Report of the Executive Officer**

=====

Agenda Description:    Report on:

- 4.1 Transcript Reimbursement Fund
- 4.2 Enforcement Activities
- 4.3 License Exam
- 4.4 Family Violence Appellate Project v. Superior Courts, Cal. Supreme  
Court Number S288176
- 4.5 CRB Budget Report

=====

Support Documents:

- Attachment 1, Item 4.1 – TRF Fund Condition
- Attachment 2, Item 4.2 – Enforcement Statistics
- Attachment 3, Item 4.3 – Dictation Exam Statistics by Reporting Method
- Attachment 4, Item 4.3 – Historical Exam Statistics
- Attachment 5, Item 4.5 – FM 11 Expenditure Projections FY 2025-26

=====

Fiscal Impact:    None

=====

Recommended Board Action:    None

**0410 - Transcript Reimbursement Fund**  
**Analysis of Fund Condition**  
**(Dollars in Thousands)**

Prepared 8.5.2026

2026 Budget Act w FM 11 Projections

Based on Estimated Transfer from Court Reporters Fund

|                                                                                                | Actuals<br>2024-25 | CY<br>2025-26 | BY<br>2026-27 | BY +1<br>2027-28 |
|------------------------------------------------------------------------------------------------|--------------------|---------------|---------------|------------------|
| <b>BEGINNING BALANCE</b>                                                                       | \$ 304             | \$ 150        | \$ 57         | \$ 164           |
| Prior Year Adjustment                                                                          | \$ 1               | \$ -          | \$ -          | \$ -             |
| Adjusted Beginning Balance                                                                     | \$ 305             | \$ 150        | \$ 57         | \$ 164           |
| <b>REVENUES, TRANSFERS AND OTHER ADJUSTMENTS</b>                                               |                    |               |               |                  |
| Revenues                                                                                       |                    |               |               |                  |
| 4163000 - Income from surplus money investments                                                | \$ 10              | \$ 7          | \$ 7          | \$ -             |
| Totals, Revenues                                                                               | \$ 10              | \$ 7          | \$ 7          | \$ -             |
| Revenue Transfer from Court Reporters Fund per B&P Code<br>Section 8030.2(d) Based on Estimate | \$ -               | \$ 100        | \$ 300        | \$ 300           |
| Totals, Transfers and Other Adjustments                                                        | \$ -               | \$ 100        | \$ 300        | \$ 300           |
| <b>TOTALS, REVENUES, TRANSFERS AND OTHER ADJUSTMENTS</b>                                       | \$ 10              | \$ 107        | \$ 307        | \$ 300           |
| <b>TOTAL RESOURCES</b>                                                                         | \$ 315             | \$ 257        | \$ 364        | \$ 464           |
| Expenditures:                                                                                  |                    |               |               |                  |
| 1111 Department of Consumer Affairs (State Operations)                                         | \$ 165             | \$ 200        | \$ 200        | \$ 200           |
| <b>TOTALS, EXPENDITURES AND EXPENDITURE ADJUSTMENTS</b>                                        | \$ 165             | \$ 200        | \$ 200        | \$ 200           |
| <b>FUND BALANCE</b>                                                                            |                    |               |               |                  |
| Reserve for economic uncertainties                                                             | \$ 150             | \$ 57         | \$ 164        | \$ 264           |
| Months in Reserve                                                                              | 9.0                | 3.4           | 9.8           | 15.8             |

**NOTES:**

1. Assumes workload and revenue projections are realized in BY+1 and ongoing.

**Consumer Protection Enforcement Initiative**  
**Fiscal Year 2025-2026 Enforcement Report -- CSR only**  
**July 1, 2025 - June 30, 2026**

***Consumer Complaints - Intake***

| <b>Complaints (Intake)</b>                                                                    | <b>July</b> | <b>August</b> | <b>Sept.</b> | <b>Oct.</b> | <b>Nov.</b> | <b>Dec.</b> | <b>January</b> | <b>Feb.</b> | <b>March</b> | <b>April</b> | <b>May</b> | <b>June</b> | <b>Total</b> |
|-----------------------------------------------------------------------------------------------|-------------|---------------|--------------|-------------|-------------|-------------|----------------|-------------|--------------|--------------|------------|-------------|--------------|
| Received                                                                                      | 13          | 10            | 8            | 7           | 13          | 12          | 11             | 13          | 10           | 14           | 10         | 15          | 136          |
| Closed without Referral for Investigation                                                     | 0           | 0             | 0            | 0           | 0           | 2           | 1              | 1           | 0            | 0            | 0          | 0           | 4            |
| Referred for Investigation                                                                    | 13          | 10            | 8            | 7           | 13          | 10          | 10             | 12          | 10           | 14           | 10         | 15          | 132          |
| Average Days to Close<br>(from receipt of complaint to closure or referral for investigation) | 1           | 1             | 1            | 1           | 1           | 1           | 1              | 1           | 1            | 1            | 1          | 1           | 1            |
| Pending                                                                                       | 0           | 0             | 0            | 0           | 0           | 0           | 0              | 0           | 0            | 0            | 0          | 0           | 0            |

| <b>Convictions/Arrests Reports (Intake)</b>                                                    | <b>July</b> | <b>August</b> | <b>Sept.</b> | <b>Oct.</b> | <b>Nov.</b> | <b>Dec.</b> | <b>January</b> | <b>Feb.</b> | <b>March</b> | <b>April</b> | <b>May</b> | <b>June</b> | <b>Total</b> |
|------------------------------------------------------------------------------------------------|-------------|---------------|--------------|-------------|-------------|-------------|----------------|-------------|--------------|--------------|------------|-------------|--------------|
| Received                                                                                       | 0           | 0             | 0            | 0           | 0           | 0           | 0              | 0           | 0            | 0            | 0          | 0           | 0            |
| Closed without Referral for Investigation                                                      | 0           | 0             | 0            | 0           | 0           | 0           | 0              | 0           | 0            | 0            | 0          | 0           | 0            |
| Referred for Investigation                                                                     | 0           | 0             | 0            | 0           | 0           | 0           | 0              | 0           | 0            | 0            | 0          | 0           | 0            |
| Average Days to Close<br>(from receipt of conviction to closure or referral for investigation) | 0           | 0             | 0            | 0           | 0           | 0           | 0              | 0           | 0            | 0            | 0          | 0           | 0            |
| Pending                                                                                        | 0           | 0             | 0            | 0           | 0           | 0           | 0              | 0           | 0            | 0            | 0          | 0           | 0            |

# Consumer Protection Enforcement Initiative

## Fiscal Year 2025-2026 Enforcement Report -- **CSR only**

### July 1, 2025 - June 30, 2026

#### *Investigation*

| <b>Desk Investigation</b>                                                                                          | <b>July</b> | <b>August</b> | <b>Sept.</b> | <b>Oct.</b> | <b>Nov.</b> | <b>Dec.</b> | <b>January</b> | <b>Feb.</b> | <b>March</b> | <b>April</b> | <b>May</b> | <b>June</b> | <b>Total</b> |
|--------------------------------------------------------------------------------------------------------------------|-------------|---------------|--------------|-------------|-------------|-------------|----------------|-------------|--------------|--------------|------------|-------------|--------------|
| Opened *                                                                                                           | 13          | 10            | 8            | 7           | 13          | 10          | 10             | 12          | 10           | 14           | 10         | 15          | 132          |
| Closed *                                                                                                           | 12          | 11            | 9            | 5           | 1           | 19          | 16             | 5           | 6            | 16           | 17         | 7           | 124          |
| Average Days to Close<br>(from start of investigation to investigation closure or referral to AG) [Straightline] * | 56          | 39            | 38           | 40          | 13          | 71          | 44             | 50          | 57           | 50           | 49         | 67          | 52           |
| Pending *                                                                                                          | 18          | 17            | 16           | 18          | 30          | 21          | 15             | 22          | 26           | 24           | 17         | 25          | 21           |

| <b>Field Investigation (Sworn)</b>                                                                 | <b>July</b> | <b>August</b> | <b>Sept.</b> | <b>Oct.</b> | <b>Nov.</b> | <b>Dec.</b> | <b>January</b> | <b>Feb.</b> | <b>March</b> | <b>April</b> | <b>May</b> | <b>June</b> | <b>Total</b> |
|----------------------------------------------------------------------------------------------------|-------------|---------------|--------------|-------------|-------------|-------------|----------------|-------------|--------------|--------------|------------|-------------|--------------|
| Assignment for Sworn Field Investigation*                                                          | 0           | 0             | 0            | 0           | 0           | 0           | 0              | 0           | 0            | 0            | 0          | 0           | 0            |
| Closed*                                                                                            | 0           | 0             | 0            | 0           | 0           | 0           | 0              | 0           | 0            | 0            | 0          | 0           | 0            |
| Average Days to Close<br>(from start of investigation to investigation closure or referral to AG)* | 0           | 0             | 0            | 0           | 0           | 0           | 0              | 0           | 0            | 0            | 0          | 0           | 0            |
| Pending*                                                                                           | 0           | 0             | 0            | 0           | 0           | 0           | 0              | 0           | 0            | 0            | 0          | 0           | 0            |

| <b>All Investigations</b>                                                                                         | <b>July</b> | <b>August</b> | <b>Sept.</b> | <b>Oct.</b> | <b>Nov.</b> | <b>Dec.</b> | <b>January</b> | <b>Feb.</b> | <b>March</b> | <b>April</b> | <b>May</b> | <b>June</b> | <b>Total</b> |
|-------------------------------------------------------------------------------------------------------------------|-------------|---------------|--------------|-------------|-------------|-------------|----------------|-------------|--------------|--------------|------------|-------------|--------------|
| Opened **                                                                                                         | 13          | 10            | 8            | 7           | 13          | 10          | 10             | 12          | 10           | 14           | 10         | 15          | 132          |
| Closed **                                                                                                         | 12          | 11            | 9            | 5           | 1           | 19          | 16             | 5           | 6            | 16           | 17         | 7           | 124          |
| Average Days to Close<br>(from receipt of complaint to investigation closure or referral to AG) [Straightline] ** | 57          | 40            | 39           | 41          | 14          | 72          | 45             | 51          | 58           | 51           | 50         | 68          | 53           |
| Pending **                                                                                                        | 18          | 17            | 16           | 18          | 30          | 21          | 15             | 22          | 26           | 24           | 17         | 25          | 21           |

\* Complaints assigned from intake.

\*\* Complaints from desk and sworn.

^ Average number of cases pending.



**Consumer Protection Enforcement Initiative**  
**Fiscal Year 2025-2026 Enforcement Report -- CSR only**  
**July 1, 2025 - June 30, 2026**

**Enforcement Actions**

| <b>AG Cases</b>                                                                                   | <b>July</b> | <b>August</b> | <b>Sept.</b> | <b>Oct.</b> | <b>Nov.</b> | <b>Dec.</b> | <b>January</b> | <b>Feb.</b> | <b>March</b> | <b>April</b> | <b>May</b> | <b>June</b> | <b>Total</b> |
|---------------------------------------------------------------------------------------------------|-------------|---------------|--------------|-------------|-------------|-------------|----------------|-------------|--------------|--------------|------------|-------------|--------------|
| AG Cases Opened/Initiated                                                                         | 0           | 0             | 2            | 0           | 0           | 1           | 0              | 0           | 0            | 1            | 3          | 0           | 7            |
| AG Cases Pending                                                                                  | 6           | 6             | 8            | 8           | 6           | 7           | 6              | 4           | 4            | 4            | 7          | 7           | 6            |
| <b>SOIs/Accusations</b>                                                                           | <b>July</b> | <b>August</b> | <b>Sept.</b> | <b>Oct.</b> | <b>Nov.</b> | <b>Dec.</b> | <b>January</b> | <b>Feb.</b> | <b>March</b> | <b>April</b> | <b>May</b> | <b>June</b> | <b>Total</b> |
| SOIs Filed                                                                                        | 0           | 0             | 0            | 0           | 0           | 0           | 0              | 0           | 0            | 0            | 0          | 0           | 0            |
| SOIs Withdrawn                                                                                    | 0           | 0             | 0            | 0           | 0           | 0           | 0              | 0           | 0            | 0            | 0          | 0           | 0            |
| SOIs Dismissed                                                                                    | 0           | 0             | 0            | 0           | 0           | 0           | 0              | 0           | 0            | 0            | 0          | 0           | 0            |
| SOIs Declined                                                                                     | 0           | 0             | 0            | 0           | 0           | 0           | 0              | 0           | 0            | 0            | 0          | 0           | 0            |
| Average Days to Complete SOIs<br>(from AG referral to SOI filed)                                  | 0           | 0             | 0            | 0           | 0           | 0           | 0              | 0           | 0            | 0            | 0          | 0           | 0            |
| Accusations Filed                                                                                 | 0           | 0             | 0            | 0           | 0           | 0           | 1              | 1           | 0            | 0            | 0          | 1           | 3            |
| Accusations Withdrawn                                                                             | 0           | 0             | 0            | 0           | 0           | 0           | 0              | 0           | 0            | 0            | 0          | 0           | 0            |
| Accusations Dismissed                                                                             | 0           | 0             | 0            | 0           | 0           | 0           | 0              | 0           | 0            | 0            | 0          | 0           | 0            |
| Accusations Declined                                                                              | 0           | 0             | 0            | 0           | 0           | 0           | 0              | 0           | 0            | 0            | 0          | 0           | 0            |
| Average Days to Complete Accusations<br>(from AG referral to accusation filed)                    | 0           | 0             | 0            | 0           | 0           | 0           | 36             | 128         | 0            | 0            | 0          | 30          | 65           |
| Petition to Revoke Probation (PRP)                                                                | 0           | 0             | 0            | 0           | 1           | 0           | 0              | 0           | 0            | 0            | 0          | 0           | 1            |
| Average Days to Complete PRP                                                                      | 0           | 0             | 0            | 0           | 271         | 0           | 0              | 0           | 0            | 0            | 0          | 0           | 271          |
| <b>Decisions/Stipulations</b>                                                                     | <b>July</b> | <b>August</b> | <b>Sept.</b> | <b>Oct.</b> | <b>Nov.</b> | <b>Dec.</b> | <b>January</b> | <b>Feb.</b> | <b>March</b> | <b>April</b> | <b>May</b> | <b>June</b> | <b>Total</b> |
| Proposed/Default Decisions                                                                        | 0           | 0             | 0            | 2           | 0           | 1           | 1              | 0           | 0            | 0            | 0          | 0           | 4            |
| Stipulations                                                                                      | 0           | 0             | 0            | 0           | 0           | 0           | 0              | 0           | 1            | 0            | 0          | 0           | 1            |
| <b>Disciplinary Orders</b>                                                                        | <b>July</b> | <b>August</b> | <b>Sept.</b> | <b>Oct.</b> | <b>Nov.</b> | <b>Dec.</b> | <b>January</b> | <b>Feb.</b> | <b>March</b> | <b>April</b> | <b>May</b> | <b>June</b> | <b>Total</b> |
| Final Orders<br>(Proposed Decisions Adopted, Default Decisions, Stipulations)                     | 0           | 0             | 0            | 0           | 2           | 0           | 1              | 1           | 0            | 1            | 0          | 0           | 5            |
| Average Days to Complete<br>(from complaint receipt to imposing formal discipline) [Straightline] | 0           | 0             | 0            | 0           | 505         | 0           | 703            | 328         | 0            | 158          | 0          | 0           | 440          |
| Interim Suspension Orders                                                                         | 0           | 0             | 0            | 0           | 0           | 0           | 0              | 0           | 0            | 0            | 0          | 0           | 0            |
| <b>Citations</b>                                                                                  | <b>July</b> | <b>August</b> | <b>Sept.</b> | <b>Oct.</b> | <b>Nov.</b> | <b>Dec.</b> | <b>January</b> | <b>Feb.</b> | <b>March</b> | <b>April</b> | <b>May</b> | <b>June</b> | <b>Total</b> |
| Final Citations                                                                                   | 2           | 3             | 2            | 0           | 0           | 1           | 3              | 0           | 5            | 4            | 4          | 0           | 24           |
| Average Days to Complete<br>(from complaint receipt to citation issued) [Straightline]            | 57          | 46            | 53           | 0           | 0           | 41          | 73             | 0           | 65           | 44           | 58         | 0           | 56           |

# Consumer Protection Enforcement Initiative

## Fiscal Year 2025-2026 Enforcement Report -- **CRF only**

### July 1, 2025 - June 30, 2026

#### *Consumer Complaints - Intake*

| Complaints (Intake)                                                                           | July | August | Sept. | Oct. | Nov. | Dec. | January | Feb. | March | April | May | June | Total |
|-----------------------------------------------------------------------------------------------|------|--------|-------|------|------|------|---------|------|-------|-------|-----|------|-------|
| Received                                                                                      | 1    | 0      | 2     | 3    | 4    | 1    | 1       | 3    | 2     | 3     | 1   | 4    | 25    |
| Closed without Referral for Investigation                                                     | 0    | 0      | 0     | 0    | 0    | 0    | 0       | 0    | 0     | 0     | 0   | 0    | 0     |
| Referred for Investigation                                                                    | 1    | 0      | 2     | 3    | 4    | 1    | 1       | 3    | 2     | 3     | 1   | 4    | 25    |
| Average Days to Close<br>(from receipt of complaint to closure or referral for investigation) | 1    | 0      | 1     | 1    | 1    | 1    | 1       | 1    | 1     | 1     | 1   | 1    | 1     |
| Pending                                                                                       | 0    | 0      | 0     | 0    | 0    | 0    | 0       | 0    | 0     | 0     | 0   | 0    | 0     |

#### *Investigation*

| Desk Investigation                                                                                                 | July | August | Sept. | Oct. | Nov. | Dec. | January | Feb. | March | April | May | June | Total |
|--------------------------------------------------------------------------------------------------------------------|------|--------|-------|------|------|------|---------|------|-------|-------|-----|------|-------|
| Opened *                                                                                                           | 1    | 0      | 2     | 3    | 4    | 1    | 1       | 3    | 2     | 3     | 1   | 4    | 25    |
| Closed *                                                                                                           | 0    | 1      | 1     | 3    | 0    | 4    | 2       | 1    | 3     | 3     | 2   | 0    | 20    |
| Average Days to Close<br>(from start of investigation to investigation closure or referral to AG) [Straightline] * | 0    | 33     | 20    | 62   | 0    | 33   | 66      | 15   | 43    | 24    | 82  | 0    | 44    |
| Pending                                                                                                            | 2    | 1      | 2     | 2    | 6    | 3    | 2       | 4    | 3     | 3     | 2   | 6    | 3     |

| Field Investigation (Sworn)                                                                        | July | August | Sept. | Oct. | Nov. | Dec. | January | Feb. | March | April | May | June | Total |
|----------------------------------------------------------------------------------------------------|------|--------|-------|------|------|------|---------|------|-------|-------|-----|------|-------|
| Assignment for Sworn Field Investigation*                                                          | 0    | 0      | 0     | 0    | 0    | 0    | 0       | 0    | 0     | 0     | 0   | 0    | 0     |
| Closed*                                                                                            | 0    | 0      | 0     | 0    | 0    | 0    | 0       | 0    | 0     | 0     | 0   | 0    | 0     |
| Average Days to Close<br>(from start of investigation to investigation closure or referral to AG)* | 0    | 0      | 0     | 0    | 0    | 0    | 0       | 0    | 0     | 0     | 0   | 0    | 0     |
| Pending                                                                                            | 0    | 0      | 0     | 0    | 0    | 0    | 0       | 0    | 0     | 0     | 0   | 0    | 0     |

| All Investigations                                                                                                | July | August | Sept. | Oct. | Nov. | Dec. | January | Feb. | March | April | May | June | Total |
|-------------------------------------------------------------------------------------------------------------------|------|--------|-------|------|------|------|---------|------|-------|-------|-----|------|-------|
| Opened **                                                                                                         | 1    | 0      | 2     | 3    | 4    | 1    | 1       | 3    | 2     | 3     | 1   | 4    | 25    |
| Closed **                                                                                                         | 0    | 1      | 1     | 3    | 0    | 4    | 2       | 1    | 3     | 3     | 2   | 0    | 20    |
| Average Days to Close<br>(from receipt of complaint to investigation closure or referral to AG) [Straightline] ** | 0    | 34     | 21    | 63   | 0    | 133  | 67      | 16   | 44    | 25    | 83  | 0    | 45    |
| Pending **                                                                                                        | 2    | 1      | 2     | 2    | 6    | 3    | 2       | 4    | 3     | 3     | 2   | 6    | 3     |

\* Complaints assigned from intake.

\*\* Complaints from desk and sworn.

^ Average number of cases pending.

**Consumer Protection Enforcement Initiative**  
**Fiscal Year 2025-2026 Enforcement Report -- CRF only**  
**July 1, 2025 - June 30, 2026**

| Citations                                                                           | July | August | Sept. | Oct. | Nov. | Dec. | January | Feb. | March | April | May | June | Total |
|-------------------------------------------------------------------------------------|------|--------|-------|------|------|------|---------|------|-------|-------|-----|------|-------|
| Final Citations                                                                     | 0    | 0      | 0     | 0    | 0    | 0    | 1       | 0    | 0     | 1     | 1   | 0    | 3     |
| Average Days to Complete (from complaint receipt to citation issued) [Straightline] | 0    | 0      | 0     | 0    | 0    | 0    | 108     | 0    | 0     | 55    | 97  | 0    | 87    |

## Dictation Exam Statistics by Reporting Method

### Steno Writers

| Exam Cycle | Total<br># Apps | Overall<br># Pass | Overall<br>% Pass | First Time<br>Applicants | First Time<br># Pass | First Time<br>% Pass |
|------------|-----------------|-------------------|-------------------|--------------------------|----------------------|----------------------|
| Nov 2022   | 75              | 17                | 22.7%             | 24                       | 13                   | 54.2%                |
| Mar 2023   | 83              | 23                | 27.7%             | 21                       | 13                   | 61.9%                |
| Jul 2023   | 87              | 29                | 33.3%             | 32                       | 19                   | 59.4%                |
| Nov 2023   | 78              | 25                | 32.1%             | 23                       | 15                   | 65.2%                |
| Mar 2024   | 63              | 13                | 20.6%             | 17                       | 10                   | 58.8%                |
| Jul 2024   | 69              | 21                | 30.4%             | 21                       | 8                    | 38.1%                |
| Nov 2024   | 74              | 21                | 28.4%             | 24                       | 12                   | 50.0%                |
| Mar 2025   | 65              | 25                | 38.5%             | 13                       | 9                    | 69.2%                |
| Jul 2025   | 77              | 32                | 41.6%             | 33                       | 23                   | 69.7%                |
| Nov 2025   | 49              | 12                | 24.5%             | 12                       | 6                    | 50.0%                |
| Mar 2026   | 59              | 20                | 33.9%             | 25                       | 17                   | 68.0%                |

### Voice Writers

| Exam Cycle | Total<br># Apps | Overall<br># Pass | Overall<br>% Pass | First Time<br>Applicants | First Time<br># Pass | First Time<br>% Pass |
|------------|-----------------|-------------------|-------------------|--------------------------|----------------------|----------------------|
| Nov 2022   | 6               | 4                 | 66.7%             | 6                        | 4                    | 66.7%                |
| Mar 2023   | 4               | 2                 | 50.0%             | 3                        | 2                    | 66.7%                |
| Jul 2023   | 16              | 11                | 68.8%             | 15                       | 11                   | 73.3%                |
| Nov 2023   | 41              | 28                | 68.3%             | 36                       | 24                   | 66.7%                |
| Mar 2024   | 41              | 33                | 80.5%             | 29                       | 25                   | 86.2%                |
| Jul 2024   | 52              | 37                | 71.2%             | 46                       | 35                   | 76.1%                |
| Nov 2024*  | 51              | 37                | 72.5%             | 44                       | 35                   | 79.5%                |
| Mar 2025*  | 40              | 35                | 87.5%             | 30                       | 27                   | 90.0%                |
| Jul 2025*  | 36              | 30                | 83.3%             | 33                       | 27                   | 81.8%                |
| Nov 2025*  | 41              | 31                | 75.6%             | 35                       | 27                   | 77.1%                |
| Mar 2026*  | 32              | 30                | 93.8%             | 26                       | 25                   | 96.2%                |

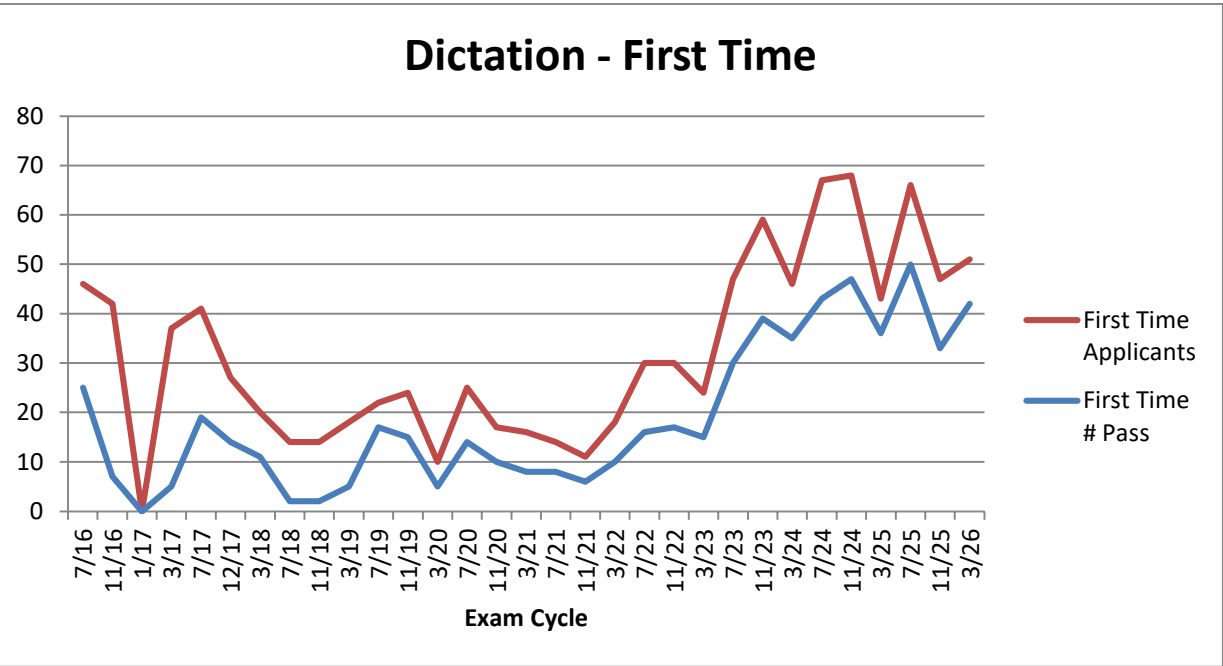
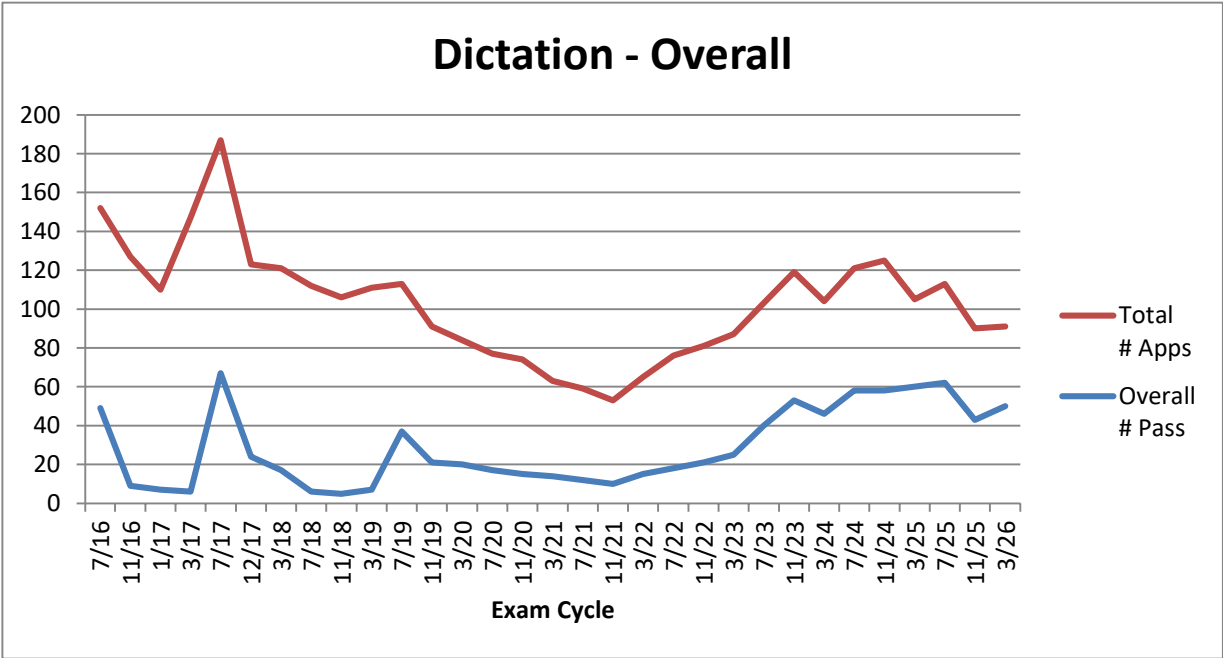
### Overall

| Exam Cycle | Total<br># Apps | Overall<br># Pass | Overall<br>% Pass | First Time<br>Applicants | First Time<br># Pass | First Time<br>% Pass |
|------------|-----------------|-------------------|-------------------|--------------------------|----------------------|----------------------|
| Nov 2022   | 81              | 21                | 25.9%             | 30                       | 17                   | 56.7%                |
| Mar 2023   | 87              | 25                | 28.7%             | 24                       | 15                   | 62.5%                |
| Jul 2023   | 103             | 40                | 38.8%             | 47                       | 30                   | 63.8%                |
| Nov 2023   | 119             | 53                | 44.5%             | 59                       | 39                   | 66.1%                |
| Mar 2024   | 104             | 46                | 44.2%             | 46                       | 35                   | 76.1%                |
| Jul 2024   | 121             | 58                | 47.9%             | 67                       | 43                   | 64.2%                |
| Nov 2024   | 125             | 58                | 46.4%             | 68                       | 47                   | 69.1%                |
| Mar 2025   | 105             | 60                | 57.1%             | 43                       | 36                   | 83.7%                |
| Jul 2025   | 113             | 62                | 54.9%             | 66                       | 50                   | 75.8%                |
| Nov 2025   | 90              | 43                | 47.8%             | 47                       | 33                   | 70.2%                |
| Mar 2026   | 91              | 50                | 54.9%             | 51                       | 42                   | 82.4%                |

## Dictation Exam

| Exam Cycle                 | Total<br># Apps | Overall<br># Pass | Overall<br>% Pass | First Time<br>Applicants | First Time<br># Pass | First Time<br>% Pass |
|----------------------------|-----------------|-------------------|-------------------|--------------------------|----------------------|----------------------|
| July 2016                  | 152             | 49                | 32.2%             | 46                       | 25                   | 54.3%                |
| Nov 2016                   | 127             | 9                 | 7.1%              | 42                       | 7                    | 16.7%                |
| Jan 2017 (Nov 2016 retest) | 110             | 7                 | 6.4%              | n/a                      | n/a                  | n/a                  |
| Mar 2017                   | 147             | 6                 | 4.1%              | 37                       | 5                    | 13.5%                |
| Jul 2017                   | 187             | 67                | 35.8%             | 41                       | 19                   | 46.3%                |
| Dec 2017                   | 123             | 24                | 19.5%             | 27                       | 14                   | 51.9%                |
| Mar 2018                   | 121             | 17                | 14.0%             | 20                       | 11                   | 55.0%                |
| Jul 2018                   | 112             | 6                 | 5.4%              | 14                       | 2                    | 14.3%                |
| Nov 2018                   | 106             | 5                 | 4.7%              | 14                       | 2                    | 14.3%                |
| Mar 2019                   | 111             | 7                 | 6.3%              | 18                       | 5                    | 27.8%                |
| Jul 2019                   | 113             | 37                | 32.7%             | 22                       | 17                   | 77.3%                |
| Nov 2019                   | 91              | 21                | 23.1%             | 24                       | 15                   | 62.5%                |
| Mar 2020                   | 84              | 20                | 23.8%             | 10                       | 5                    | 50.0%                |
| Jul 2020                   | 77              | 17                | 22.1%             | 25                       | 14                   | 56.0%                |
| Nov 2020                   | 74              | 15                | 20.3%             | 17                       | 10                   | 58.8%                |
| Mar 2021                   | 63              | 14                | 22.2%             | 16                       | 8                    | 50.0%                |
| Jul 2021                   | 59              | 12                | 20.3%             | 14                       | 8                    | 57.1%                |
| Nov 2021                   | 53              | 10                | 18.9%             | 11                       | 6                    | 54.5%                |
| Mar 2022                   | 65              | 15                | 23.1%             | 18                       | 10                   | 55.6%                |
| Jul 2022                   | 76              | 18                | 23.7%             | 30                       | 16                   | 53.3%                |
| Nov 2022                   | 81              | 21                | 25.9%             | 30                       | 17                   | 56.7%                |
| Mar 2023                   | 87              | 25                | 28.7%             | 24                       | 15                   | 62.5%                |
| Jul 2023                   | 103             | 40                | 38.8%             | 47                       | 30                   | 63.8%                |
| Nov 2023                   | 119             | 53                | 44.5%             | 59                       | 39                   | 66.1%                |
| Mar 2024                   | 104             | 46                | 44.2%             | 46                       | 35                   | 76.1%                |
| Jul 2024                   | 121             | 58                | 47.9%             | 67                       | 43                   | 64.2%                |
| Nov 2024                   | 125             | 58                | 46.4%             | 68                       | 47                   | 69.1%                |
| Mar 2025                   | 105             | 60                | 57.1%             | 43                       | 36                   | 83.7%                |
| Jul 2025                   | 113             | 62                | 54.9%             | 66                       | 50                   | 75.8%                |
| Nov 2025                   | 90              | 43                | 47.8%             | 47                       | 33                   | 70.2%                |
| Mar 2026                   | 91              | 50                | 54.9%             | 51                       | 42                   | 82.4%                |

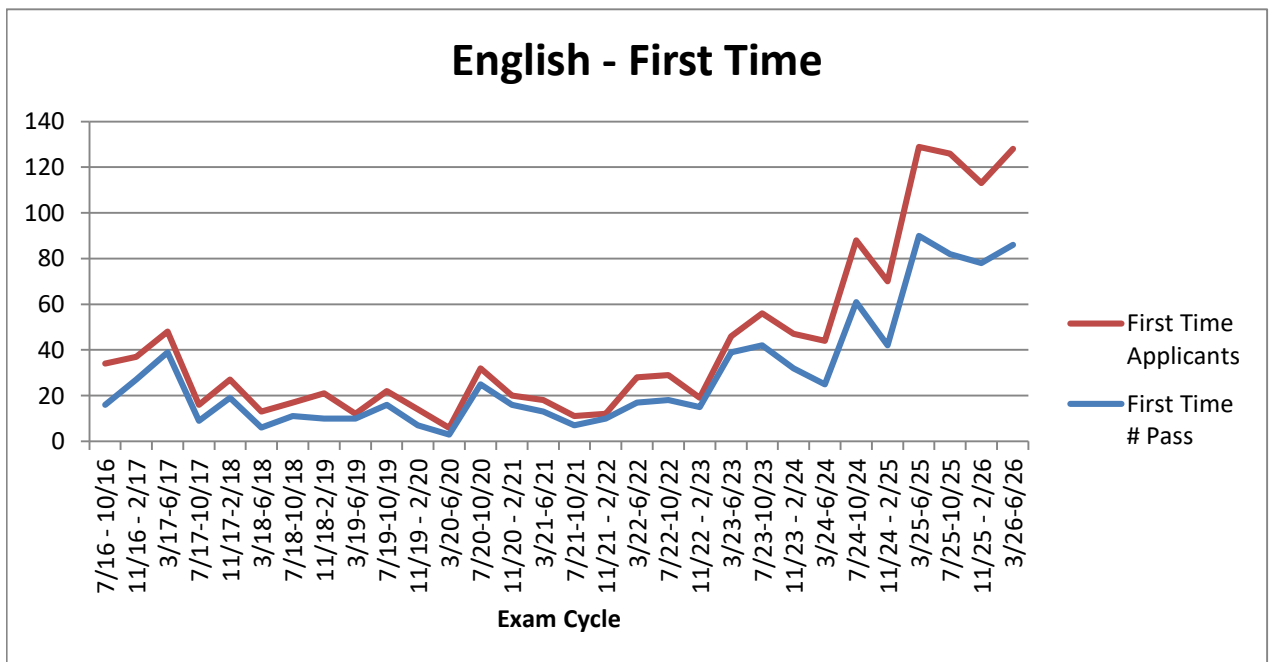
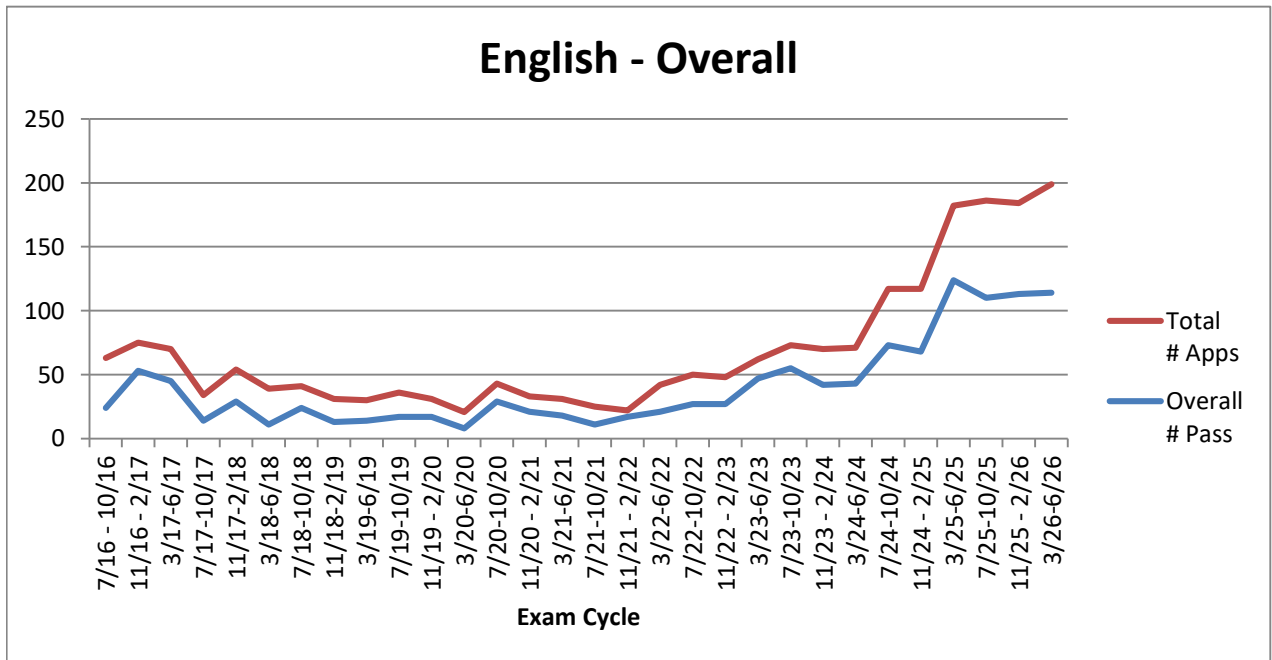
Dictation Exam



## English Exam

| Exam Cycle          | Total<br># Apps | Overall<br># Pass | Overall<br>% Pass | First Time<br>Applicants | First Time<br># Pass | First Time<br>% Pass |
|---------------------|-----------------|-------------------|-------------------|--------------------------|----------------------|----------------------|
| Jul 2016 - Oct 2016 | 63              | 24                | 38.1%             | 34                       | 16                   | 47.1%                |
| Nov 2016 - Feb 2017 | 75              | 53                | 70.7%             | 37                       | 27                   | 73.0%                |
| Mar 2017 - Jun 2017 | 70              | 45                | 64.3%             | 48                       | 39                   | 81.3%                |
| Jul 2017 - Oct 2017 | 34              | 14                | 41.2%             | 16                       | 9                    | 56.3%                |
| Nov 2017 - Feb 2018 | 54              | 29                | 53.7%             | 27                       | 19                   | 70.4%                |
| Mar 2018 - Jun 2018 | 39              | 11                | 28.2%             | 13                       | 6                    | 46.2%                |
| Jul 2018 - Oct 2018 | 41              | 24                | 58.5%             | 17                       | 11                   | 64.7%                |
| Nov 2018 - Feb 2019 | 31              | 13                | 41.9%             | 21                       | 10                   | 47.6%                |
| Mar 2019 - Jun 2019 | 30              | 14                | 46.7%             | 12                       | 10                   | 83.3%                |
| Jul 2019 - Oct 2019 | 36              | 17                | 47.2%             | 22                       | 16                   | 72.7%                |
| Nov 2019 - Feb 2020 | 31              | 17                | 54.8%             | 14                       | 7                    | 50.0%                |
| Mar 2020 - Jun 2020 | 21              | 8                 | 38.1%             | 6                        | 3                    | 50.0%                |
| Jul 2020 - Oct 2020 | 43              | 29                | 67.4%             | 32                       | 25                   | 78.1%                |
| Nov 2020 - Feb 2021 | 33              | 21                | 63.6%             | 20                       | 16                   | 80.0%                |
| Mar 2021 - Jun 2021 | 31              | 18                | 58.1%             | 18                       | 13                   | 72.2%                |
| Jul 2021 - Oct 2021 | 25              | 11                | 44.0%             | 11                       | 7                    | 63.6%                |
| Nov 2021 - Feb 2022 | 22              | 17                | 77.3%             | 12                       | 10                   | 83.3%                |
| Mar 2022 - Jun 2022 | 42              | 21                | 50.0%             | 28                       | 17                   | 60.7%                |
| Jul 2022 - Oct 2022 | 50              | 27                | 54.0%             | 29                       | 18                   | 62.1%                |
| Nov 2022 - Feb 2023 | 48              | 27                | 56.3%             | 19                       | 15                   | 78.9%                |
| Mar 2023 - Jun 2023 | 62              | 47                | 75.8%             | 46                       | 39                   | 84.8%                |
| Jul 2023 - Oct 2023 | 73              | 55                | 75.3%             | 56                       | 42                   | 75.0%                |
| Nov 2023 - Feb 2024 | 70              | 42                | 60.0%             | 47                       | 32                   | 68.1%                |
| Mar 2024 - Jun 2024 | 71              | 43                | 60.6%             | 44                       | 25                   | 56.8%                |
| Jul 2024 - Oct 2024 | 117             | 73                | 62.4%             | 88                       | 61                   | 69.3%                |
| Nov 2024 - Feb 2025 | 117             | 68                | 58.1%             | 70                       | 42                   | 60.0%                |
| Mar 2025 - Jun 2025 | 182             | 124               | 68.1%             | 129                      | 90                   | 69.8%                |
| Jul 2025 - Oct 2025 | 186             | 110               | 59.1%             | 126                      | 82                   | 65.1%                |
| Nov 2025 - Feb 2026 | 184             | 113               | 61.4%             | 113                      | 78                   | 69.0%                |
| Mar 2026 - Jun 2026 | 199             | 114               | 57.3%             | 128                      | 86                   | 67.2%                |

## English Exam

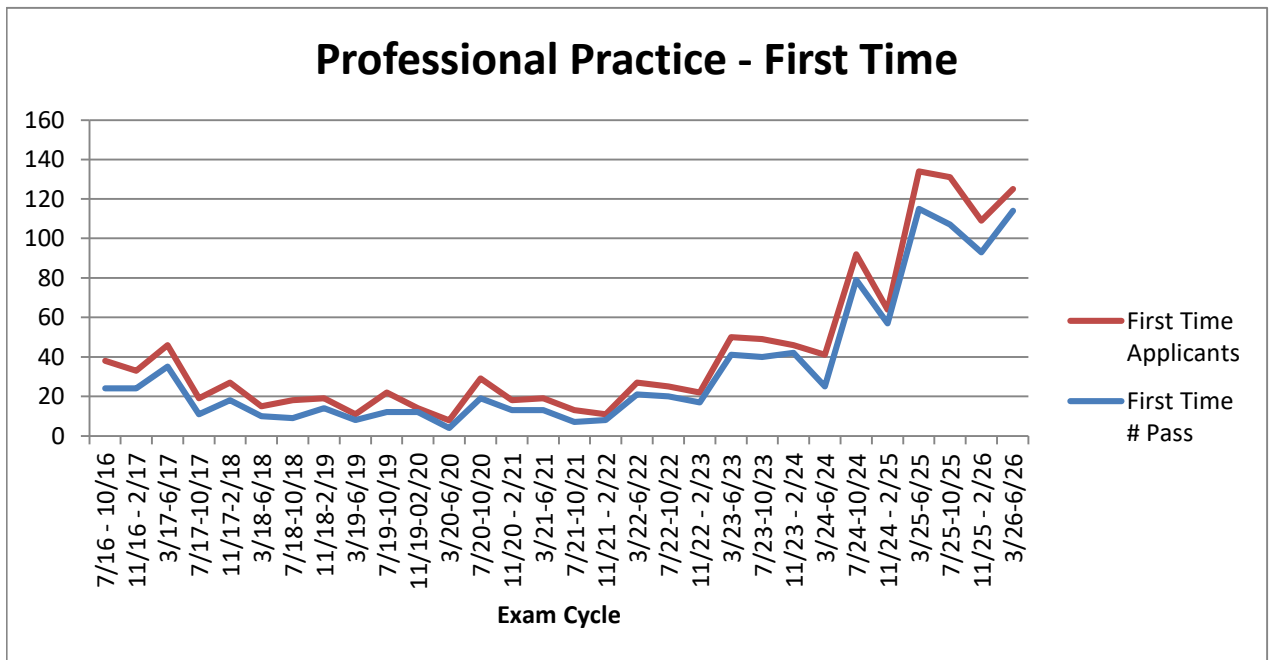
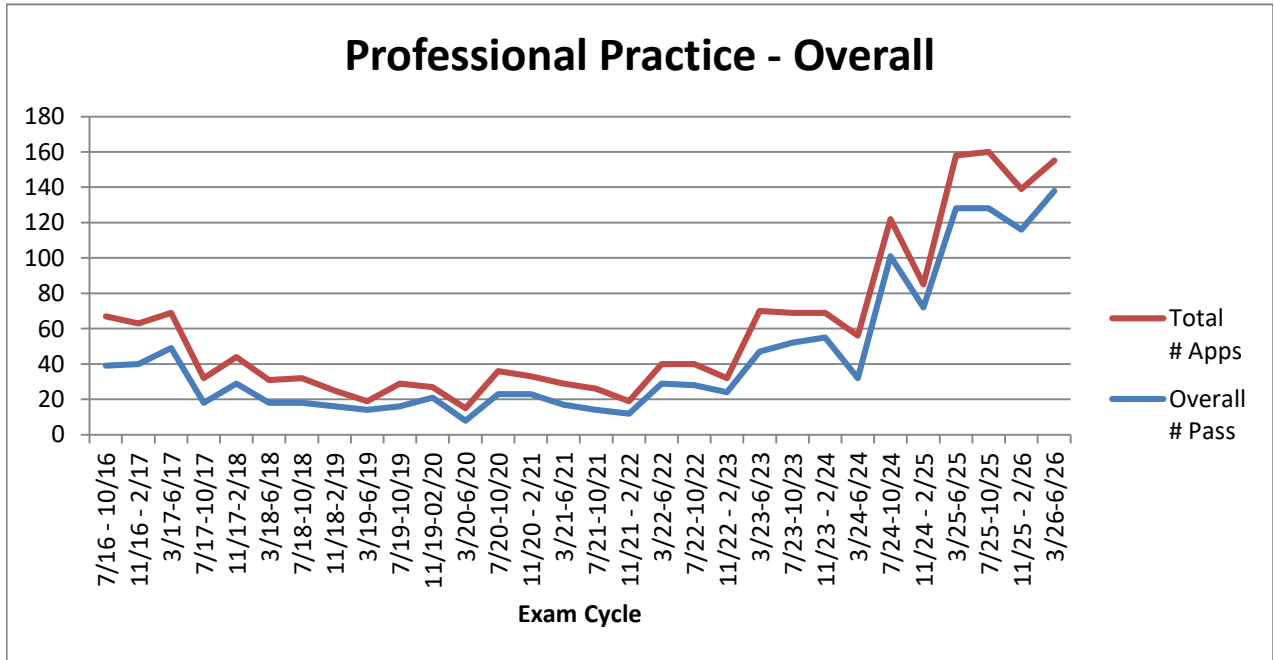




## Professional Practice Exam

| Exam Cycle          | Total<br># Apps | Overall<br># Pass | Overall<br>% Pass | First Time<br>Applicants | First Time<br># Pass | First Time<br>% Pass |
|---------------------|-----------------|-------------------|-------------------|--------------------------|----------------------|----------------------|
| Jul 2016 - Oct 2016 | 67              | 39                | 58.2%             | 38                       | 24                   | 63.2%                |
| Nov 2016 - Feb 2017 | 63              | 40                | 63.5%             | 33                       | 24                   | 72.7%                |
| Mar 2017 - Jun 2017 | 69              | 49                | 71.0%             | 46                       | 35                   | 76.1%                |
| Jul 2017 - Oct 2017 | 32              | 18                | 56.3%             | 19                       | 11                   | 57.9%                |
| Nov 2017 - Feb 2018 | 44              | 29                | 65.9%             | 27                       | 18                   | 66.7%                |
| Mar 2018 - Jun 2018 | 31              | 18                | 58.1%             | 15                       | 10                   | 66.7%                |
| Jul 2018 - Oct 2018 | 32              | 18                | 56.3%             | 18                       | 9                    | 50.0%                |
| Nov 2018 - Feb 2019 | 25              | 16                | 64.0%             | 19                       | 14                   | 73.7%                |
| Mar 2019 - Jun 2019 | 19              | 14                | 73.7%             | 11                       | 8                    | 72.7%                |
| Jul 2019 - Oct 2019 | 29              | 16                | 55.2%             | 22                       | 12                   | 54.5%                |
| Nov 2019 - Feb 2020 | 27              | 21                | 77.8%             | 14                       | 12                   | 85.7%                |
| Mar 2020 - Jun 2020 | 15              | 8                 | 53.3%             | 8                        | 4                    | 50.0%                |
| Jul 2020 - Oct 2020 | 36              | 23                | 63.9%             | 29                       | 19                   | 65.5%                |
| Nov 2020 - Feb 2021 | 33              | 23                | 69.7%             | 18                       | 13                   | 72.2%                |
| Mar 2021 - Jun 2021 | 29              | 17                | 58.6%             | 19                       | 13                   | 68.4%                |
| Jul 2021 - Oct 2021 | 26              | 14                | 53.8%             | 13                       | 7                    | 53.8%                |
| Nov 2021 - Feb 2022 | 19              | 12                | 63.2%             | 11                       | 8                    | 72.7%                |
| Mar 2022 - Jun 2022 | 40              | 29                | 72.5%             | 27                       | 21                   | 77.8%                |
| Jul 2022 - Oct 2022 | 40              | 28                | 70.0%             | 25                       | 20                   | 80.0%                |
| Nov 2022 - Feb 2023 | 32              | 24                | 75.0%             | 22                       | 17                   | 77.3%                |
| Mar 2023 - Jun 2023 | 70              | 47                | 67.1%             | 50                       | 41                   | 82.0%                |
| Jul 2023 - Oct 2023 | 69              | 52                | 75.4%             | 49                       | 40                   | 81.6%                |
| Nov 2023 - Feb 2024 | 69              | 55                | 79.7%             | 46                       | 42                   | 91.3%                |
| Mar 2024 - Jun 2024 | 56              | 32                | 57.1%             | 41                       | 25                   | 61.0%                |
| Jul 2024 - Oct 2024 | 122             | 101               | 82.8%             | 92                       | 79                   | 85.9%                |
| Nov 2024 - Feb 2025 | 85              | 72                | 84.7%             | 64                       | 57                   | 89.1%                |
| Mar 2025 - Jun 2025 | 158             | 128               | 81.0%             | 134                      | 115                  | 85.8%                |
| Jul 2025 - Oct 2025 | 160             | 128               | 80.0%             | 131                      | 107                  | 81.7%                |
| Nov 2025 - Feb 2026 | 139             | 116               | 83.5%             | 109                      | 93                   | 85.3%                |
| Mar 2026 - Jun 2026 | 155             | 138               | 89.0%             | 125                      | 114                  | 91.2%                |

## Professional Practice Exam



Department of Consumer Affairs  
Expenditure Projection Report  
Court Reporters Board of California  
Reporting Structure(s): 11113110 Support  
Fiscal Month: 11  
Fiscal Year: 2025 - 2026

PERSONAL SERVICES

| Fiscal Code | Line Item                      | PY Budget | PY FM13   | Budget    | Current Month | YTD       | Encumbrance | YTD + Encumbrance | Projections to Year End | Balance   |
|-------------|--------------------------------|-----------|-----------|-----------|---------------|-----------|-------------|-------------------|-------------------------|-----------|
| 5100        | PERMANENT POSITIONS            | \$413,000 | \$435,428 | \$412,000 | \$36,430      | \$400,240 | \$0         | \$400,240         | \$432,838               | -\$20,838 |
| 5100        | TEMPORARY POSITIONS            | \$11,000  | \$33,932  | \$11,000  | \$2,570       | \$27,936  | \$0         | \$27,936          | \$33,821                | -\$22,821 |
| 5105-5108   | PER DIEM, OVERTIME, & LUMP SUM | \$14,000  | \$13,101  | \$14,000  | \$0           | \$9,123   | \$0         | \$9,123           | \$9,923                 | \$4,077   |
| 5150        | STAFF BENEFITS                 | \$238,000 | \$280,958 | \$256,000 | \$25,201      | \$275,456 | \$0         | \$275,456         | \$300,213               | -\$44,213 |
|             | PERSONAL SERVICES              | \$676,000 | \$763,420 | \$693,000 | \$64,201      | \$712,754 | \$0         | \$712,754         | \$776,795               | -\$83,795 |

OPERATING EXPENSES & EQUIPMENT

| Fiscal Code | Line Item                      | PY Budget | PY FM13   | Budget    | Current Month | YTD       | Encumbrance | YTD + Encumbrance | Projections to Year End | Balance   |
|-------------|--------------------------------|-----------|-----------|-----------|---------------|-----------|-------------|-------------------|-------------------------|-----------|
| 5301        | GENERAL EXPENSE                | \$27,000  | \$8,484   | \$27,000  | \$111         | \$5,994   | \$1,059     | \$7,054           | \$7,654                 | \$19,346  |
| 5302        | PRINTING                       | \$10,000  | \$127     | \$10,000  | \$0           | \$600     | \$75        | \$675             | \$1,800                 | \$8,200   |
| 5304        | COMMUNICATIONS                 | \$4,000   | \$2,011   | \$4,000   | \$199         | \$2,012   | \$0         | \$2,012           | \$2,859                 | \$1,141   |
| 5306        | POSTAGE                        | \$2,000   | \$4,840   | \$2,000   | \$0           | \$2,448   | \$0         | \$2,448           | \$3,900                 | -\$1,900  |
| 53202-204   | IN STATE TRAVEL                | \$5,000   | \$20,833  | \$5,000   | \$0           | \$10,917  | \$0         | \$10,917          | \$12,000                | -\$7,000  |
| 5322        | TRAINING                       | \$0       | \$0       | \$0       | \$0           | \$112     | \$0         | \$112             | \$112                   | -\$112    |
| 5324        | FACILITIES                     | \$61,000  | \$57,902  | \$61,000  | \$5,062       | \$54,816  | \$4,870     | \$59,686          | \$60,311                | \$689     |
| 53402-53403 | C/P SERVICES (INTERNAL)        | \$216,000 | \$82,295  | \$216,000 | \$3,680       | \$70,984  | \$0         | \$70,984          | \$102,529               | \$113,471 |
| 53404-53405 | C/P SERVICES (EXTERNAL)        | \$110,000 | \$113,654 | \$110,000 | \$0           | \$53,373  | \$69,786    | \$123,158         | \$127,990               | -\$17,990 |
| 5342        | DEPARTMENT PRORATA             | \$165,000 | \$156,128 | \$169,000 | \$250         | \$128,750 | \$0         | \$128,750         | \$129,000               | \$40,000  |
| 5342        | DEPARTMENTAL SERVICES          | \$0       | \$50,943  | \$0       | \$0           | \$48,314  | \$0         | \$48,314          | \$48,323                | -\$48,323 |
| 5344        | CONSOLIDATED DATA CENTERS      | \$3,000   | \$3,188   | \$3,000   | \$0           | \$0       | \$0         | \$0               | \$3,119                 | -\$119    |
| 5346        | INFORMATION TECHNOLOGY         | \$2,000   | \$552     | \$2,000   | \$0           | \$693     | \$0         | \$693             | \$693                   | \$1,307   |
| 5362-5368   | EQUIPMENT                      | \$8,000   | \$13,292  | \$3,000   | \$0           | \$5,196   | \$13,010    | \$18,206          | \$18,206                | -\$15,206 |
| 5390        | OTHER ITEMS OF EXPENSE         | \$1,000   | \$0       | \$1,000   | \$0           | \$0       | \$0         | \$0               | \$0                     | \$1,000   |
| 54          | SPECIAL ITEMS OF EXPENSE       | \$0       | \$1,166   | \$0       | \$0           | \$175     | \$0         | \$175             | \$391                   | -\$391    |
|             | OPERATING EXPENSES & EQUIPMENT | \$614,000 | \$515,414 | \$613,000 | \$9,301       | \$384,383 | \$88,800    | \$473,184         | \$518,887               | \$94,113  |

|                |             |             |             |          |             |          |             |             |          |
|----------------|-------------|-------------|-------------|----------|-------------|----------|-------------|-------------|----------|
| OVERALL TOTALS | \$1,290,000 | \$1,278,834 | \$1,306,000 | \$73,502 | \$1,097,138 | \$88,800 | \$1,185,938 | \$1,295,682 | \$10,318 |
|----------------|-------------|-------------|-------------|----------|-------------|----------|-------------|-------------|----------|

|                    |             |             |             |          |             |          |             |             |         |
|--------------------|-------------|-------------|-------------|----------|-------------|----------|-------------|-------------|---------|
| REIMBURSEMENTS     | -\$18,000   | -\$9,117    | -\$18,000   |          |             |          |             | -\$10,000   |         |
| OVERALL NET TOTALS | \$1,272,000 | \$1,269,717 | \$1,288,000 | \$73,502 | \$1,097,138 | \$88,800 | \$1,185,938 | \$1,285,682 | \$2,318 |

0.18%

COURT REPORTERS BOARD MEETING – AUGUST 21, 2026

**AGENDA ITEM 5 – Possible License Fee Increase**

=====

Agenda Description: Review of fund conditions for discussion and possible action regarding license fee increase.

=====

Brief Summary:

The Board has been carefully monitoring the balance of the Court Reporters Board fund for several years. The Board's fund should contain a maximum of 24 months in reserve and a minimum of two months. Analysis of the fund condition reflecting the current license fee of \$225 charged by the Board predicts the fund balance remaining above the six months' reserve through the 2028-29 budget year as shown on Attachment 1.

A review of the expenditure projection provided as Attachment 5 to Agenda Item 4.5, the Executive Officer's Report, reveals that virtually the entirety of the Board's budget is spent on the mandated activities of administering the license exam and the Transcript Reimbursement Fund, conducting school oversight, and disciplinary and enforcement activities. As a historical note, renewal fees have not been increased since July 2018.

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Support Documents:

Attachment – CRB Fund Condition

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Recommended Board Action: Staff recommends the Board continue to monitor the overall fund condition in order to fully fund the Transcript Reimbursement Fund.

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**0771 - Court Reporter's Board Fund**

**Analysis of Fund Condition**

(Dollars in Thousands)

2026 Budget Act w FM 11 Projections

Prepared 8.5.2026

Based on Estimated Transfer to Transcript Reimbursement Fund

**BEGINNING BALANCE**

Prior Year Adjustment  
Adjusted Beginning Balance

| Actuals<br>2024-25 | PY<br>2025-26 | CY<br>2026-27 | BY<br>2027-28 |
|--------------------|---------------|---------------|---------------|
| \$ 1,433           | \$ 1,576      | \$ 1,620      | \$ 1,399      |
| \$ 10              | \$ -          | \$ -          | \$ -          |
| \$ 1,443           | \$ 1,576      | \$ 1,620      | \$ 1,399      |

**REVENUES, TRANSFERS AND OTHER ADJUSTMENTS**

Revenues

4121200 - Delinquent fees  
4127400 - Renewal fees  
4129200 - Other regulatory fees  
4129400 - Other regulatory licenses and permits  
4163000 - Income from surplus money investments

|          |          |          |          |
|----------|----------|----------|----------|
| \$ 21    | \$ 17    | \$ 21    | \$ 21    |
| \$ 1,263 | \$ 1,294 | \$ 1,273 | \$ 1,273 |
| \$ 24    | \$ 20    | \$ 20    | \$ 20    |
| \$ 96    | \$ 119   | \$ 89    | \$ 89    |
| \$ 77    | \$ 69    | \$ 73    | \$ 60    |

Totals, Revenues

|          |          |          |          |
|----------|----------|----------|----------|
| \$ 1,481 | \$ 1,519 | \$ 1,476 | \$ 1,463 |
|----------|----------|----------|----------|

Revenue Transfer to Transcript Reimbursement Fund per B&P Code Section

|      |         |         |         |
|------|---------|---------|---------|
| \$ - | \$ -100 | \$ -300 | \$ -300 |
|------|---------|---------|---------|

Totals, Transfers and Other Adjustments

|      |         |         |         |
|------|---------|---------|---------|
| \$ - | \$ -100 | \$ -300 | \$ -300 |
|------|---------|---------|---------|

**TOTALS, REVENUES, TRANSFERS AND OTHER ADJUSTMENTS**

|          |          |          |          |
|----------|----------|----------|----------|
| \$ 1,481 | \$ 1,419 | \$ 1,176 | \$ 1,163 |
|----------|----------|----------|----------|

**TOTAL RESOURCES**

|          |          |          |          |
|----------|----------|----------|----------|
| \$ 2,924 | \$ 2,995 | \$ 2,796 | \$ 2,562 |
|----------|----------|----------|----------|

Expenditures:

1111 Department of Consumer Affairs (State Operations)  
9892 Supplemental Pension Payments (State Operations)  
9900 Statewide General Administrative Expenditures (Pro Rata) (State

|          |          |          |          |
|----------|----------|----------|----------|
| \$ 1,270 | \$ 1,286 | \$ 1,293 | \$ 1,332 |
| \$ 5     | \$ -     | \$ -     | \$ -     |
| \$ 73    | \$ 89    | \$ 104   | \$ 104   |

**TOTALS, EXPENDITURES AND EXPENDITURE ADJUSTMENTS**

|          |          |          |          |
|----------|----------|----------|----------|
| \$ 1,348 | \$ 1,375 | \$ 1,397 | \$ 1,436 |
|----------|----------|----------|----------|

**FUND BALANCE**

Reserve for economic uncertainties

|          |          |          |          |
|----------|----------|----------|----------|
| \$ 1,576 | \$ 1,620 | \$ 1,399 | \$ 1,126 |
|----------|----------|----------|----------|

Months in Reserve

|      |      |      |     |
|------|------|------|-----|
| 13.8 | 13.9 | 11.7 | 9.2 |
|------|------|------|-----|

**NOTES:**

1. Assumes workload and revenue projections are realized in BY+1 and ongoing.
2. Expenditure growth projected at 3% beginning BY+1.

## COURT REPORTERS BOARD MEETING – AUGUST 21, 2026

### AGENDA ITEM 6 – Legislation

=====

Agenda Description: Briefing on current legislation related to the court reporting industry and/or the Court Reporters Board with discussion and possible action.

=====

Brief Summary: (Bills with a notation of \*\*\* are of particular interest or impact to court reporting or the Court Reporters Board specifically)

6.1 \*\*\*[AB 667](#) (Solache) – Professions and vocations: license examinations: interpreters. (Failed) This bill would require various boards under the jurisdiction of the Department of Consumer Affairs, by January 1, 2027, to include an additional section in a license application for an applicant to identify their preferred written, spoken, and signed languages. The bill would require each board, beginning on July 1, 2027, to conduct an annual review of applicants' language preferences, and, by July 1, 2027, to also determine whether there is a substantial number of non-English-speaking applicants, as defined, who require the services of an interpreter. The bill would require each board to report the determinations to the Legislature by January 1, 2028, and, beginning January 1, 2029, to annually report to specified legislative committees on the language preference data collected from license applications.

6.2 \*\*\*[AB 882](#) (Papan) – Electronic court reporting. (Assembly Appropriations) This bill would, until January 1, 2028, authorize the court to use electronic recording technology in civil proceedings when specified circumstances are met, including, among other things, when a litigant who cannot afford to retain a private court reporter has requested a verbatim record of the proceeding. The bill would require a court to find that a litigant cannot afford to retain a private court reporter if any specified circumstances are met, including when the litigant has been granted a waiver of court fees for the proceeding. The bill would require the court to follow prescribed procedures when the court lacks sufficient reporters or official reporters pro tempore to provide verbatim records, as specified, including, among other things, providing public notice that the court is accepting applications from certified shorthand reporters for positions as official court reporters. The bill would set forth a grievance and arbitration process for resolving disputes regarding compliance with these provisions, as specified. The bill would require a transcript created from electronic recordings to include a designation for portions of the recording that contain no audible sound or are not discernible.

The bill would require the Judicial Council to develop and approve official forms for use in trial courts consistent with the above provisions. The bill would require each trial court to report to the Judicial Council, on a quarterly basis, specified information, including, among other things, the number of applications received by the court from certified shorthand reporters. The bill would require the Judicial Council to make this information public available on its internet website.

6.3 [AB 1767](#) (Berman) – Department of Consumer Affairs: public members of boards: conflicts of interest. (Senate floor) This bill would establish a clear definition for “close family member” in the Business and Professions Code for

purposes of existing conflict of interest laws applicable to public members of state licensing boards.

6.4 [AB 1775](#) (Ward) – Veterans. (Senate Appropriations, suspense) This bill would restore benefits and status to veterans who were discharged from the armed services solely as a result of Executive Order No. 14183 issued on January 27, 2025. For the Department of Consumer Affairs, this would primarily affect licensure expediting.

6.5 \*\*\*[AB 2290](#) (Lackey) – Civil discovery: oral depositions: transcriptions. (Senate floor) This bill would permit the deposition officer to transmit a certified deposition transcript to the attorney of the party who noticed the deposition via secure electronic means, when requested by that attorney. The bill would require an electronically transmitted transcript to be in a format that ensures it is authentic and has not been altered. The bill would make an electronically stored transcript admissible as an original transcript where the attorney presenting it certifies that it is a true and correct copy of the transcript that they received electronically.

6.6 \*\*\*[AB 2783](#) (Assembly Judiciary, Chair Kalra) – Court reporting. (Senate floor) This bill would also allow successful completion of the Registered Professional Reporter (RPR) certification administered through the National Court Reporters Association to satisfy the requirement to pass the Dictation/Transcription portion of the examination.

This bill would extend the duration of the 13-county remote reporting pilot program and would require all pilot projects to terminate no later than July 1, 2028, and would repeal these provisions on January 1, 2029. The bill would require the superior courts in the Counties of Los Angeles, Mendocino, San Bernardino, San Mateo, and Tulare to submit data and information to the Judicial Council, as specified, and would require the Judicial Council to present that information and its own report to the Legislature by January 1, 2027

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Support Documents: None

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Recommended Board Action: Board may take a position of support, opposition, or remain neutral.

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COURT REPORTERS BOARD MEETING – AUGUST 21, 2026

**AGENDA ITEM 7 – Regulations**

=====

Agenda Description: Discussion and Possible Action on California Code of Regulations, Title 16:

7.1 Section 2472 – Disciplinary Guidelines

=====

Brief Summary: At its October 17, 2025, meeting, the Board reviewed and approved the proposed Disciplinary and Denial Guidelines publication and regulatory text to make changes to California Code of Regulations (CCR) section 2472 and directed Board staff to proceed with the rulemaking process. The rulemaking proposal was distributed, published, and available for comment for the required 45-day period that concluded on April 7, 2026. No comments were received regarding the proposal.

During the comment period, Board staff identified additional related and minor, non-substantive changes that are being recommended for the rulemaking proposal. To make these changes to the proposal, the Board is asked to review and approve a 15-day Notice of Availability of Modified Text that identifies and allows comment on the proposed changes and to direct Board staff to release and publish the modified text notice and to proceed with the rulemaking process if no adverse comments are received during the 15-day comment period. In the attached publication modified text document, added text is indicated with a double underline and deleted text is indicated by ~~double-strikeout~~.

=====

Support Documents:

Attachment 1 – Disciplinary and Denial Guidelines Notice of Availability of Modified Text

Attachment 2 – Disciplinary and Denial Guidelines Publication Modified Text

=====

Recommended Board Action: Staff recommend the Board review and approve the proposed Disciplinary and Denial Guidelines publication modified text and instruct staff to proceed with the rulemaking process, including the Notice of Availability of Modified Text.

Sample Motion:

I move that the Board approve the modified changes to CCR section 2472 for the Disciplinary and Denial Guidelines publication as provided in the materials and direct staff to proceed with the rulemaking process for this proposal, including the Notice of Availability of Modified Text. If no adverse comments are received during the 15-day comment period, authorize the Executive Officer to take all steps necessary to complete the rulemaking and adopt the proposed regulatory language for CCR section 2472 as noticed and modified, with the authority to make any technical or non-substantive changes.

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Agenda Description: Discussion and Possible Action on California Code of Regulations, Title 16:

7.2 Section 2410 (2452) – Transcript Reimbursement Fund Application and Applicant Privacy

=====

Brief Summary: This rulemaking proposal will add CCR section 2452 to establish the content of and procedures and requirements for the applications for Transcript Reimbursement Fund (TRF) reimbursement.

At its May 9, 2025, meeting, the Board reviewed and approved the proposed adoption of California Code of Regulations (CCR) section 2410 (subsequently renumbered to 2452 by the Executive Officer after the Board meeting as a non-substantive change) to add the Transcript Reimbursement Fund Application and Applicant Privacy regulation and directed Board staff to proceed with the rulemaking process. After initial review by the Business and Consumer Services Agency, Board staff and legal counsel revised the proposed regulatory language for CCR section 2452 to eliminate subsection (c), and it is now before the Board for consideration. Also attached is the proposed regulatory language that the Board originally approved at its May 2025 meeting.

=====

Support Documents:

Attachment 3 – Transcript Reimbursement Fund Application Regulatory Language (section 2452) (revised dated 8/21/26)

Attachment 4 – Transcript Reimbursement Fund Application and Applicant Privacy Regulatory Language (section 2410) (original dated 5/9/25)

=====

Recommended Board Action: Staff recommend the Board review and approve the revised proposed regulatory language to add CCR section 2452 for the Transcript Reimbursement Fund Application and instruct staff to proceed with the rulemaking process.

Sample Motion:

I move that the Board rescind its May 9, 2025, motion and approve the revised changes to add CCR section 2452 and the newly proposed regulatory text of the Transcript Reimbursement Fund Application regulation as provided in the materials and direct staff to submit the approved text to the Director of the Department of Consumer Affairs and the Business and Consumer Services Agency for review. If no adverse comments are received, authorize the Executive Officer to take all steps necessary to initiate the rulemaking process, make any non-substantive changes to the package, and set the matter for hearing if requested. If no adverse comments are received during the 45-day comment period and no hearing is requested, authorize the Executive Officer to take all steps necessary to complete the rulemaking and adopt the proposed regulatory language for CCR section 2452 as noticed, with the authority to make any technical or non-substantive changes.

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Agenda Description: Discussion and Possible Action on California Code of Regulations, Title 16:

7.3 Sections 2412, 2418, 2420, 2431-2436 – Examinations and Applications

=====

Brief Summary: This rulemaking proposal will establish information the Board may obtain in and procedures for submission of its examination, licensure, and renewal applications. It also updates the 97.5% accuracy required for the qualifier examination to 95% and adds procedures for qualification under the National Court Reporters Association or National Verbatim Reporters Association certificates to align with the statutes.

=====

Support Document:

Attachment 5 – Examinations and Applications Proposed Regulatory Language

=====

Recommended Board Action: Staff recommend the Board review and approve the Examinations and Applications proposed regulatory language and instruct staff to proceed with the rulemaking process.

Sample Motion:

I move that the Board approve the proposed regulatory text for CCR sections 2412, 2418, 2420, 2431-2436 as provided in the materials and direct staff to submit the approved text to the Director of the Department of Consumer Affairs and the Business and Consumer Services Agency for review. If no adverse comments are received, authorize the Executive Officer to take all steps necessary to initiate the rulemaking process, make any non-substantive changes to the package, and set the matter for hearing if requested. If no adverse comments are received during the 45-day comment period and no hearing is requested, authorize the Executive Officer to take all steps necessary to complete the rulemaking and adopt the proposed regulatory language for CCR sections 2412, 2418, 2420, 2431-2436 as noticed, with the authority to make any technical or non-substantive changes.

=====

STATE OF CALIFORNIA  
Department of Consumer Affairs  
Title 16. Professional and Vocational Regulations  
Division 24. Court Reporters Board of California

**NOTICE OF AVAILABILITY OF MODIFIED TEXT OF PROPOSED REGULATIONS  
CONCERNING DISCIPLINARY GUIDELINES**

**NOTICE IS HEREBY GIVEN** that the Court Reporters Board of California (Board) has proposed modifications made to proposed regulation 16 CCR section 2472, related to Disciplinary Guidelines. These regulations were originally noticed on February 20, 2026, and approved as modified by the Board at its **August 21**, 2026, meeting.

Materials regarding this proposal can be found at Laws and Regulations – Court Reporters Board of California ([www.courtreportersboard.ca.gov/lawsregs/index.shtml](http://www.courtreportersboard.ca.gov/lawsregs/index.shtml)) or by requesting them from the Contact Person identified below.

**Any person who wishes to comment on the proposed modifications may do so by submitting written comments between **Monday, August XX**, 2026, and 5:00 p.m. on **Wednesday, September XX**, 2026, to the following:**

|                |                                                                                                   |
|----------------|---------------------------------------------------------------------------------------------------|
| Contact Name:  | Yvonne Fenner                                                                                     |
| Address:       | Court Reporters Board of California<br>2535 Capitol Oaks Drive, Suite 230<br>Sacramento, CA 95833 |
| Fax number:    | 916-263-3660                                                                                      |
| Email Address: | Yvonne.Fenner@dca.ca.gov                                                                          |

Please note, comments should be restricted to the most recent modifications made to the proposed regulations. Added text is indicated with a double underline. Deleted text is indicated by ~~double-strikeout~~. The Board is not required to respond to comments on other aspects of the proposed regulations received in response to this notice.

Any comments previously submitted remain in the rulemaking file and will be responded to by the Board's staff as part of the Final Statement of Reasons. All written comments received by **Wednesday, September XX**, 2026, that pertain to these modifications will be reviewed and responded to by the Board's staff as part of the compilation of the rulemaking file.

*This notice is given pursuant to the requirements of Government Code section 11346.8, subdivision (c), and California Code of Regulations, title 1, section 44.*

DATED: \_\_\_\_\_

\_\_\_\_\_  
Yvonne Fenner  
Executive Officer  
Court Reporters Board of California



# State of California Court Reporters Board of California



## Disciplinary and Denial Guidelines

New [OAL insert effective date]

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## I. Introduction

The Court Reporters Board of California (Board) is responsible for the enforcement of statutes and regulations related to the practice of shorthand reporting, more commonly known as court reporting. The Board serves the consumers of California by:

- Developing and administering the licensing examination, ensuring that newly licensed court reporters possess the basic skills needed and meet the minimum requirements for the profession;
- Overseeing the curriculum of court reporting schools;
- Disciplining licensees in the event of a violation of law or regulation; and
- Administering the Transcript Reimbursement Fund, which provides reimbursement for transcripts to qualified indigent litigants.

Business and Professions Code (BPC) sections 8005.1 and 8015 mandate that protection of the public shall be the highest priority for the Board in exercising its licensing, regulatory, and disciplinary functions. Whenever the protection of the public is inconsistent with other interests sought to be promoted, the protection of the public shall be paramount.

To foster uniformity of penalties and to ensure applicants and licensees understand the consequences of violating laws or regulations governing court reporting, the Board has established these Disciplinary and Denial Guidelines (Guidelines). These Guidelines are intended to guide everyone involved in and affected by the disciplinary and denial processes, including applicants, licensees, the public, attorneys, courts, administrative law judges, Board staff, Board members who review and vote on proposed decisions and stipulations, and other interested parties.

The violations for which the Board may take disciplinary action or deny a license are specified within the Board's laws and regulations, as well as general provisions of the BPC. These Guidelines provide a range of penalties for each violation of law or regulation and recommend appropriate conditions of probation for these violations. The terms "license" and "certificate" are used interchangeably herein to refer to a court reporter's license. Court reporters are also known as certified shorthand reporters (CSRs).

The Board recognizes there are often aggravating or mitigating factors that may necessitate deviation from the Guidelines. The Board respectfully requests that the administrative law judge consider, apply, and analyze these factors in proposed decisions when deciding upon the severity of the penalty within the suggested range. Of utmost importance is the effect the applicant's or licensee's conduct had or can have on the consumer.

In all disciplinary cases, the Board shall seek recovery of the reasonable costs of the investigation and enforcement of the case in accordance with BPC section 125.3. This includes all fees and costs incurred by the Board from the Office of the Attorney General, the Division of Investigation, and Board services, including fees charged by expert consultants before and through the conclusion of the administrative hearing. The Board seeks reimbursement of these costs because the burden for payment of the

costs of investigation and prosecution of disciplinary cases should fall upon those whose proven conduct required investigation and prosecution, not upon the profession as a whole. Cost recovery payment serves an important rehabilitative function by making licensees who have been disciplined confront the impacts of their actions and deterring future misconduct thereby further promoting public protection. However, cost recovery cannot be ordered for an applicant who is denied a license because it is not authorized per BPC section 125.3.

If a proposed decision orders a probationary period, the Board requests the imposition of the appropriate conditions of probation as outlined in these Guidelines. These conditions are intended to protect the public from the probationer without being unduly burdensome or anti-competitive.

## **II. Substantially Related Criteria and Factors to be Considered in Determining Penalties**

The Board may deny, suspend, or revoke a license if the applicant or licensee has been convicted of a crime, professional misconduct, or act that is substantially related to the qualifications, functions, or duties of a shorthand reporter based on the criteria specified in California Code of Regulations, title 16 (CCR), section 2470, as applicable.

Causes for discipline and license denial and the recommended penalty ranges are covered in Chapter IV – Penalty Guidelines for Violations. However, in addition to the causes for discipline and license denial and recommended penalty ranges listed in Chapter IV of these Guidelines, the following criteria and factors shall be considered in determining the penalty.

### **Denial of a License**

When considering the denial of a court reporter's certificate under BPC sections 480, 8025, or 8025.1, the Board shall apply the rehabilitation criteria set forth in CCR section 2471(a).

### **Suspension or Revocation of a License**

When considering the suspension or revocation of a court reporter's certificate under BPC sections 141, 490, 8025, or 8025.1, the Board shall apply the rehabilitation criteria set forth in CCR section 2471(b).

### **Additional Factors and Types of Evidence**

The following factors are for determining whether the minimum or maximum penalty, or an intermediate penalty, should be imposed in a given case:

1. Actual or potential harm to the consumer.
2. Actual or potential harm to the public.
3. Prior disciplinary record, including level of compliance with disciplinary order(s).
4. Number or nature of current violations, or both.
5. Aggravating evidence.

6. Mitigating evidence, including whether the licensee has demonstrated an ongoing commitment to completing continuing education.
7. Whether the conduct was intentional or negligent or demonstrated incompetence, or both.
8. Acceptance of the Board's suggested resolution to the consumer complaint.
9. Any attempts to intimidate the consumer.
10. Evidence that the unlawful act was part of a pattern or practice.
11. Financial benefit to the applicant or licensee (Respondent) from the misconduct.
12. If applicable, evidence of expungement proceedings pursuant to Penal Code section 1203.4.

The following are examples of types of evidence that the Respondent may submit to the Board to demonstrate their rehabilitative efforts and competency, and the Board will review the evidence submitted:

- Recent<sup>1</sup>, dated letters from persons in positions of authority who have on-the-job knowledge of Respondent's work as a shorthand reporter that include the period of time and capacity in which the person worked with Respondent. Such reports must be signed under penalty of perjury and will be subject to verification by Board staff.
- Recent, dated letters from counselors regarding Respondent's participation in a rehabilitation or recovery program that include at least a description and requirements of the program, a therapist or mental health professional's diagnosis of the condition and current state of recovery, and the therapist or mental health professional's basis for determining rehabilitation. Such letters and reports will be subject to verification by Board staff.
- Recent, dated letters describing Respondent's participation in support groups (e.g., Alcoholics Anonymous, Narcotics Anonymous, professional support groups, etc.). Such letters and reports will be subject to verification by Board staff.
- Recent, dated letters from probation or parole officers regarding Respondent's participation in or compliance with terms and conditions of probation or parole, or both, that include at least a description of the terms and conditions and the officer's basis for determining compliance. Such letters and reports will be subject to verification by Board staff.
- Recent, dated letters from persons familiar with Respondent in either a personal or professional capacity regarding their knowledge of: Respondent's rehabilitation, if any; the conduct of which Respondent is accused; or any other pertinent facts that would enable the Board to better decide the case. Such letters must be signed under penalty of perjury and will be subject to verification by Board staff.

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<sup>1</sup> For the purposes of these guidelines, "recent" means within 60 calendar days, preferably within 30 calendar days.



### III. Definition of Penalties

**Denial of license:** Denial of the issuance of a license as the result of any one or more violations of the Shorthand Reporters Practice Act and other relevant laws. Denial of a license is permanent unless Respondent subsequently reapplies for a license. For violations of BPC sections 480-489 and 496, Respondent may reapply for licensure after a minimum of one (1) year from the effective date of the decision per BPC section 486 unless the Board prescribes a different date, and the applicant must demonstrate to the Board's satisfaction that they are rehabilitated.

**Revocation:** Loss of a license as the result of any one or more violations of the Shorthand Reporters Practice Act and other relevant laws. Revocation of a license is permanent unless Respondent takes affirmative action to petition the Board for reinstatement of their license within three (3) years after the license expiration date and demonstrates to the Board's satisfaction that they are rehabilitated (see Item B – Petition for Reinstatement under Chapter VI – Model Orders).

**Suspension:** Invalidation of a license for a fixed period of time, not to exceed a period of one (1) year.

**Stayed Revocation:** Revocation of a license, held in abeyance (stayed) pending Respondent's compliance with the terms and conditions of their probation.

**Stayed Suspension:** Suspension of a license, stayed pending Respondent's compliance with the terms and conditions of their probation.

**Probation:** A period during which Respondent's sentence is stayed in return for Respondent's agreement to comply with specified conditions relating to improving their conduct or preventing the likelihood of a reoccurrence of the violation.

### IV. Penalty Guidelines for Violations

The following minimum and maximum penalty recommendations shall be considered in determining the penalty for the corresponding violation of the BPC:

**Penalty Guidelines for Violations Table**

| BPC SECTION(S)    | VIOLATION DESCRIPTION  | MINIMUM PENALTY                                                                                                                                                                                            | MAXIMUM PENALTY                                                                                                                                                                                            |
|-------------------|------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>APPLICANTS</b> |                        |                                                                                                                                                                                                            |                                                                                                                                                                                                            |
| <b>496</b>        | Examination Subversion | <b>Denial of License</b> <ul style="list-style-type: none"><li>Applicant cannot reapply for licensure for a minimum of one (1) year from the effective date of the decision per BPC section 486.</li></ul> | <b>Denial of License</b> <ul style="list-style-type: none"><li>Applicant cannot reapply for licensure for a minimum of one (1) year from the effective date of the decision per BPC section 486.</li></ul> |

|                            |                                                                                                   |                                                                                                                                                                                                               |                                                                                                                                                                                                               |
|----------------------------|---------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>8016</b>                | Certificate Required for Shorthand Reporting Practice                                             | <b>Denial of License</b> <ul style="list-style-type: none"> <li>Applicant cannot reapply for licensure for a minimum of one (1) year from the effective date of the decision.</li> </ul>                      | <b>Denial of License</b> <ul style="list-style-type: none"> <li>Applicant cannot reapply for licensure for a minimum of one (1) year from the effective date of the decision.</li> </ul>                      |
| <b>8018</b>                | Title and Abbreviation                                                                            | <b>Denial of License</b> <ul style="list-style-type: none"> <li>Applicant cannot reapply for licensure for a minimum of one (1) year from the effective date of the decision.</li> </ul>                      | <b>Denial of License</b> <ul style="list-style-type: none"> <li>Applicant cannot reapply for licensure for a minimum of one (1) year from the effective date of the decision.</li> </ul>                      |
| <b>8025(a) / 480(a)</b>    | Substantially Related Criminal Conviction                                                         | <b>Denial of License</b> <ul style="list-style-type: none"> <li>Applicant cannot reapply for licensure for a minimum of one (1) year from the effective date of the decision per BPC section 486.</li> </ul>  | <b>Denial of License</b> <ul style="list-style-type: none"> <li>Applicant cannot reapply for licensure for a minimum of one (1) year from the effective date of the decision per BPC section 486.</li> </ul>  |
| <b>8025(c) / 480(e)</b>    | False Statement of Fact on Application                                                            | <b>Denial of License</b> <ul style="list-style-type: none"> <li>Applicant cannot reapply for licensure for a minimum of one (1) year from the effective date of the decision per BPC section 486.</li> </ul>  | <b>Denial of License</b> <ul style="list-style-type: none"> <li>Applicant cannot reapply for licensure for a minimum of one (1) year from the effective date of the decision per BPC section 486.</li> </ul>  |
| <b>8025(i) / 480(a)(2)</b> | Formal Discipline by Another Licensing Board                                                      | <b>Denial of License</b> <ul style="list-style-type: none"> <li>Applicant cannot reapply for licensure for a minimum of one (1) year from the effective date of the decision per BPC section 486.</li> </ul>  | <b>Denial of License</b> <ul style="list-style-type: none"> <li>Applicant cannot reapply for licensure for a minimum of one (1) year from the effective date of the decision per BPC section 486.</li> </ul>  |
| <b><u>8025(j)</u></b>      | <b><u>Violation of the Chapter or the Statutes, Rules, and Regulations Pertaining to CSRs</u></b> | <b><u>Denial of License</u></b> <ul style="list-style-type: none"> <li><b><u>Applicant cannot reapply for licensure for a minimum of one (1) year from the effective date of the decision.</u></b></li> </ul> | <b><u>Denial of License</u></b> <ul style="list-style-type: none"> <li><b><u>Applicant cannot reapply for licensure for a minimum of one (1) year from the effective date of the decision.</u></b></li> </ul> |
| <b>8025.1(a)(1)</b>        | Physical or Mental Infirmary or Incapacity                                                        | <b>Denial of License</b> <ul style="list-style-type: none"> <li>Applicant cannot reapply for licensure for a minimum of one (1) year from the effective date of the decision.</li> </ul>                      | <b>Denial of License</b> <ul style="list-style-type: none"> <li>Applicant cannot reapply for licensure for a minimum of one (1) year from the effective date of the decision.</li> </ul>                      |

|                      |                                                       |                                                                                                                                                                                                                                                       |                                                                                                                                                                                                                                                             |
|----------------------|-------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>8025.1(a)(2)</b>  | Abuse of Chemical Substances or Alcohol               | <b>Denial of License</b> <ul style="list-style-type: none"> <li>Applicant cannot reapply for licensure for a minimum of one (1) year from the effective date of the decision.</li> </ul>                                                              | <b>Denial of License</b> <ul style="list-style-type: none"> <li>Applicant cannot reapply for licensure for a minimum of one (1) year from the effective date of the decision.</li> </ul>                                                                    |
| <b>LICENSEES</b>     |                                                       |                                                                                                                                                                                                                                                       |                                                                                                                                                                                                                                                             |
| <b>496</b>           | Examination Subversion                                | <b>Revocation</b> <ul style="list-style-type: none"> <li>Cost Recovery</li> </ul>                                                                                                                                                                     | <b>Revocation</b> <ul style="list-style-type: none"> <li>Cost Recovery</li> </ul>                                                                                                                                                                           |
| <b>8016</b>          | Certificate Required for Shorthand Reporting Practice | <b>Stayed Revocation</b> <ul style="list-style-type: none"> <li>Four (4) years' probation</li> <li>Standard Conditions 1-11 and 13-15, as applicable</li> <li>Optional Conditions, as applicable</li> <li>Cost Recovery</li> </ul>                    | <b>Revocation</b> <ul style="list-style-type: none"> <li>Maximum penalty should be imposed in cases where the Board notified the licensee in writing of an expired license, and the licensee failed to renew the license.</li> <li>Cost Recovery</li> </ul> |
| <b>8018</b>          | Title and Abbreviation                                | <b>Stayed Suspension – 90 calendar days</b> <ul style="list-style-type: none"> <li>Four (4) years' probation</li> <li>Standard Conditions 1-11 and 13-15, as applicable</li> <li>Optional Conditions, as applicable</li> <li>Cost Recovery</li> </ul> | <b>Revocation</b> <ul style="list-style-type: none"> <li>Maximum penalty should be imposed in cases where the Board has previously educated Respondent on the requirements of section 8018 in writing.</li> <li>Cost Recovery</li> </ul>                    |
| <b>8019</b>          | Aiding and Abetting                                   | <b>Stayed Revocation</b> <ul style="list-style-type: none"> <li>Four (4) years' probation</li> <li>Standard Conditions 1-11 and 13-15, as applicable</li> <li>Optional Conditions, as applicable</li> <li>Cost Recovery</li> </ul>                    | <b>Revocation</b> <ul style="list-style-type: none"> <li>Cost Recovery</li> </ul>                                                                                                                                                                           |
| <b>8025(a) / 490</b> | Conviction of a Substantially Related Crime           | <b>Stayed Revocation</b> <ul style="list-style-type: none"> <li>Three (3) years' probation</li> <li>Standard Conditions 1-15, as applicable</li> <li>Optional Conditions, as applicable</li> <li>Cost Recovery</li> </ul>                             | <b>Revocation</b> <ul style="list-style-type: none"> <li>Cost Recovery</li> </ul>                                                                                                                                                                           |

|                            |                                                                                                                                      |                                                                                                                                                                                                                                            |                                                                                     |
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| <b>8025(b)</b>             | Failure to Notify Board of Conviction                                                                                                | <b>Stayed Revocation</b> <ul style="list-style-type: none"> <li>• Three (3) years' probation</li> <li>• Standard Conditions 1-15, as applicable</li> <li>• Optional Conditions, as applicable</li> <li>• Cost Recovery</li> </ul>          | <b>Revocation</b> <ul style="list-style-type: none"> <li>• Cost Recovery</li> </ul> |
| <b>8025(c) / 498 / 499</b> | Fraud, Deceit, or Misrepresentation in Obtaining Certificate, or Securing Certificate by Knowingly Omitting to State a Material Fact | <b>Revocation</b> <ul style="list-style-type: none"> <li>• Cost Recovery</li> </ul>                                                                                                                                                        | <b>Revocation</b> <ul style="list-style-type: none"> <li>• Cost Recovery</li> </ul> |
| <b>8025(d)</b>             | Fraud, Dishonesty, Corruption, Willful Violation of Duty                                                                             | <b>Stayed Revocation</b> <ul style="list-style-type: none"> <li>• Four (4) years' probation</li> <li>• Standard Conditions 1-11 and 13-15, as applicable</li> <li>• Optional Conditions, as applicable</li> <li>• Cost Recovery</li> </ul> | <b>Revocation</b> <ul style="list-style-type: none"> <li>• Cost Recovery</li> </ul> |
| <b>8025(d)</b>             | Gross Negligence or Incompetence                                                                                                     | <b>Stayed Revocation</b> <ul style="list-style-type: none"> <li>• Four (4) years' probation</li> <li>• Standard Conditions 1-11 and 13-15, as applicable</li> <li>• Optional Conditions, as applicable</li> <li>• Cost Recovery</li> </ul> | <b>Revocation</b> <ul style="list-style-type: none"> <li>• Cost Recovery</li> </ul> |
| <b>8025(d)</b>             | Unprofessional Conduct                                                                                                               | <b>Stayed Revocation</b> <ul style="list-style-type: none"> <li>• Four (4) years' probation</li> <li>• Standard Conditions 1-11 and 13-15, as applicable</li> <li>• Optional Conditions, as applicable</li> <li>• Cost Recovery</li> </ul> | <b>Revocation</b> <ul style="list-style-type: none"> <li>• Cost Recovery</li> </ul> |

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| <b>8025(e)</b>       | Repeated Unexcused Failure to Transcribe Notes of Cases Pending Appeal and to Timely File Transcripts of those Notes, or Transcribe or File Notes of Other Proceedings | <b>Stayed Revocation</b> <ul style="list-style-type: none"> <li>• Two (2) years' probation</li> <li>• Standard Conditions 1-11 and 13-15, as applicable</li> <li>• Optional Conditions, as applicable</li> <li>• Cost Recovery</li> </ul> | <b>Revocation</b> <ul style="list-style-type: none"> <li>• Cost Recovery</li> </ul> |
| <b>8025(f)</b>       | Negligent Loss or Destruction of Stenographic Notes Preventing Transcript Production                                                                                   | <b>Stayed Revocation</b> <ul style="list-style-type: none"> <li>• Two (2) years' probation</li> <li>• Standard Conditions 1-11 and 13-15, as applicable</li> <li>• Optional Conditions, as applicable</li> <li>• Cost Recovery</li> </ul> | <b>Revocation</b> <ul style="list-style-type: none"> <li>• Cost Recovery</li> </ul> |
| <b>8025(g)</b>       | Failure to Comply with or Pay Monetary Sanction by Court for Failure to Provide Timely Transcripts                                                                     | <b>Stayed Revocation</b> <ul style="list-style-type: none"> <li>• Two (2) years' probation</li> <li>• Standard Conditions 1-11 and 13-15, as applicable</li> <li>• Optional Conditions, as applicable</li> <li>• Cost Recovery</li> </ul> | <b>Revocation</b> <ul style="list-style-type: none"> <li>• Cost Recovery</li> </ul> |
| <b>8025(h)</b>       | Failure to Pay Civil Penalty Relating to Provision of Court Reporting Services or Products                                                                             | <b>Stayed Revocation</b> <ul style="list-style-type: none"> <li>• Two (2) years' probation</li> <li>• Standard Conditions 1-11 and 13-15, as applicable</li> <li>• Optional Conditions, as applicable</li> <li>• Cost Recovery</li> </ul> | <b>Revocation</b> <ul style="list-style-type: none"> <li>• Cost Recovery</li> </ul> |
| <b>8025(i) / 141</b> | Revocation, Suspension, or Other Disciplinary Action by Another State, Agency of the Federal Government, or Another Country                                            | <b>Stayed Revocation</b> <ul style="list-style-type: none"> <li>• Two (2) years' probation</li> <li>• Standard Conditions 1-11 and 13-15, as applicable</li> <li>• Optional Conditions, as applicable</li> <li>• Cost Recovery</li> </ul> | <b>Revocation</b> <ul style="list-style-type: none"> <li>• Cost Recovery</li> </ul> |

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| <b>8025(j)</b>      | Violation of the Chapter or the Statutes, Rules, and Regulations Pertaining to <b>Certified Shorthand Reporters</b> | <b>Stayed Revocation</b> <ul style="list-style-type: none"> <li>• Two (2) years' probation</li> <li>• Standard Conditions 1-11 and 13-15, as applicable</li> <li>• Optional Conditions, as applicable</li> <li>• Cost Recovery</li> </ul> | <b>Revocation</b> <ul style="list-style-type: none"> <li>• Cost Recovery</li> </ul> |
| <b>8025.1(a)(1)</b> | Physical or Mental Infirmary or Incapacity                                                                          | <b>Stayed Revocation</b> <ul style="list-style-type: none"> <li>• Two (2) years' probation</li> <li>• Standard Conditions 1-11 and 13-15, as applicable</li> <li>• Optional Conditions, as applicable</li> <li>• Cost Recovery</li> </ul> | <b>Revocation</b> <ul style="list-style-type: none"> <li>• Cost Recovery</li> </ul> |
| <b>8025.1(a)(2)</b> | Abuse of Chemical Substances or Alcohol                                                                             | <b>Stayed Revocation</b> <ul style="list-style-type: none"> <li>• Two (2) years' probation</li> <li>• Standard Conditions 1-11 and 13-15, as applicable</li> <li>• Optional Conditions, as applicable</li> <li>• Cost Recovery</li> </ul> | <b>Revocation</b> <ul style="list-style-type: none"> <li>• Cost Recovery</li> </ul> |

## V. Probation Conditions

Probation conditions, detailed on the following pages, are divided into two (2) categories: **(A) STANDARD CONDITIONS**, which are those conditions of probation that shall appear in all cases involving probation as a standard term and condition, and **(B) OPTIONAL CONDITIONS**, which are those conditions to be imposed, if warranted, based upon the nature and circumstances of an individual case.

**All** cases that include probation as a penalty shall include the following conditions of probation:

1. Include Standard Conditions A1 through A11 in all cases.
  - If the Respondent is on criminal probation, add A12.
  - If the Respondent is a reporting corporation/firm, add A13 through A15.
2. Include Optional Conditions B1 through B14, as appropriate, based on the nature and circumstances of an individual case.

## **A. Standard Conditions of Probation**

*Terms and conditions to be included in **all** orders of probation.*

During the period of probation:

- 1. OBEY ALL LAWS** – Respondent shall obey all federal, state, and local laws and regulations governing shorthand reporters and remain in full compliance with any court-ordered criminal probation, criminal court-ordered payments (fines and fees), and other requirements. A full and detailed account of all misdemeanor and felony arrests and convictions occurring during the period of probation shall be reported by Respondent to the Board or its designee in writing by mail, email, or in person within seven (7) calendar days after occurrence. A “full and detailed account” shall include charges, dates of arrest and conviction(s), title and case number of the criminal case, name and location of the criminal court, and disposition of the case(s). To permit monitoring of compliance with this term and condition, Respondent shall submit a completed California Department of Justice state and federal Live Scan fingerprint form unless previously submitted as part of the licensure application process. Fingerprints shall be submitted through Live Scan fingerprinting services within 15 calendar days after the effective date of this Decision and Order. Respondent shall pay the cost associated with the fingerprint process.
- 2. COMPLY WITH THE BOARD’S PROBATION PROGRAM** – Respondent shall fully comply with the conditions of the probation program established by the Board and cooperate with the Board and its designee in its monitoring and investigation of Respondent’s compliance with the Board’s probation program. Respondent shall provide the Board or its designee with unrestricted access to inspect shorthand reporting records, transcriptions, and notes required to be maintained by the licensee pursuant to CCR section 2403(a)(8) and (b)(4), California Code of Civil Procedure section 2025.510(e), Government Code section 69955(e), and Local Rules of Court. Respondent shall inform the Board of any address change in writing by mail, email, or in person and shall claim all certified mail issued by the Board or its designee within 15 calendar days after the date of the address change or attempted delivery of the certified mail. Respondent shall timely respond to all notices of requests for information and shall submit reports, remedial education documentation, verification of employment, or other similar reports by mail, email, or in person within 15 calendar days after requested and directed by the Board or its designee in writing by mail or email. Failure to appear for any scheduled meeting or cooperate with the requirements of the probation program or failure to timely submit requested information as specified herein or otherwise specified in this order within 15 calendar days shall constitute a violation of probation.

Unless specified otherwise in the Board’s order or by written notice to the Respondent from the Board or its designee by mail or email, all correspondence from the Respondent to the Board or its designee, or from an outside party regarding the Respondent, including notices, information,



documents, reports, and other submissions, shall be made by mail or in person to the Board's headquarters address or by email to the Board's Enforcement or general email address, as listed under the "Contact Us" page on the Board's website.

- 3. QUARTERLY REPORTS OF COMPLIANCE** – Respondent shall submit written quarterly reports of compliance with all probation conditions to the Board or its designee by mail, email, or in person in accordance with this section. Quarterly reports shall be completed and signed under penalty of perjury that Respondent is complying with all conditions of probation. These reports or declarations shall contain statements relative to Respondent's compliance with all the conditions of the Board's probation program, including (A) written disclosures regarding whether Respondent has complied with each term and condition of probation contained in this Decision and, if applicable, (B) if Respondent discloses that they are not in compliance with any term or condition, a written statement regarding why Respondent is not in compliance with any term or condition of probation ("complete quarterly report").

Complete quarterly reports are due for each year of probation and the entire length of probation as follows:

- For the period covering January 1 through March 31, reports shall be completed and submitted between April 1 and April 10.
- For the period covering April 1 through June 30, reports shall be completed and submitted between July 1 and July 10.
- For the period covering July 1 through September 30, reports shall be completed and submitted between October 1 and October 10.
- For the period covering October 1 through December 31, reports shall be completed and submitted between January 1 and January 10.

Incomplete written reports or reports submitted or postmarked after the reporting dates listed above shall be considered late and not in compliance with this condition. Omission or falsification of any information in any manner on these reports shall constitute a violation of probation.

- 4. MAINTAIN CURRENT AND ACTIVE LICENSE** – Respondent shall maintain a current and active license for the length of the probation period, including any period of suspension. Failure to pay all fees prior to the license expiration date shall constitute a violation of probation.
- 5. RESIDENCY OUTSIDE OF THE STATE (TOLLING)** – Respondent shall notify the Board or its designee of any and all address changes as specified in this section in writing by mail, email, or in person within five (5) calendar days of the address change. If Respondent travels outside of California for a contiguous period greater than 60 calendar days, Respondent shall notify the Board or its designee of the dates of departure and return in writing by mail, email, or in person within five (5) calendar days of the date of the departure or return. Respondent shall submit a written document annually verifying



Respondent's out-of-state residency to the Board or its designee by mail, email, or in person within 30 calendar days after requested by the Board or its designee that includes the following:

- A. Respondent's Full Legal Name,
- B. Respondent's Board License Number,
- C. Physical Address,
- D. Telephone Number,
- E. Email Address,
- F. Beginning Date of Residency Outside of California, and
- G. Ending Date of Residency Outside of California (if applicable).

Periods of residence outside of California shall not reduce the probation time period (known as "tolling" of the probationary period). Respondent's probation is tolled if and when they reside, temporarily or permanently, outside of California for longer than 60 consecutive calendar days.

It shall be a violation of probation for Respondent's probation to remain tolled pursuant to the provisions of this condition for a period of three (3) years (1,095 consecutive calendar days) or more. Respondent shall not be relieved of the obligation to maintain an active and current license with the Board. However, Respondent shall not be considered in violation of probation as long as Respondent is residing and practicing in another state of the United States and is on active probation with the licensing authority of that state; in which case, the three-year tolling limitation period for out-of-state residency or practice shall begin on the date probation is completed or terminated in that state.

Periods of non-residency do not relieve Respondent of the responsibility to comply with the terms and conditions of probation. At all times during the probationary period and during any period of non-residency, Respondent shall continue to comply with all of the terms and conditions of probation, including the obligation to maintain an active and current license with the Board and to comply with the Board's probation program, quarterly reports of compliance, and cost recovery.

- 6. FAILURE TO PRACTICE – CALIFORNIA RESIDENT (TOLLING)** – In the event Respondent resides in California and for any reason they stop practicing in California, Respondent shall notify the Board or its designee of the dates of nonpractice and return to practice in writing by mail, email, or in person within 30 calendar days prior to the date of nonpractice or return to practice. Respondent shall submit a written document annually verifying Respondent's California residency and nonpractice status to the Board or its designee by mail, email, or in person within 30 calendar days after requested by the Board or its designee that includes the following:

- A. Respondent's Full Legal Name,
- B. Respondent's Board License Number,
- C. Physical Address,

- D. Telephone Number,
- E. Email Address,
- F. Beginning Date of Nonpractice Status, and
- G. Ending Date of Nonpractice Status (if applicable).

Periods of California residency and nonpractice status shall not reduce the probation time period. Respondent's probation is tolled if and when they reside in California and are, temporarily or permanently, not practicing court reporting for longer than 60 consecutive calendar days.

It shall be a violation of probation for Respondent's probation to remain tolled pursuant to the provisions of this condition for a period of three (3) years (1,095 consecutive calendar days) or more. Respondent shall not be relieved of the obligation to maintain an active and current license with the Board.

Periods of California residency and nonpractice status do not relieve Respondent of the responsibility to comply with the terms and conditions of probation. At all times during the probationary period and during any period of nonpractice, Respondent shall continue to comply with all of the terms and conditions of probation, including the obligation to maintain an active and current license with the Board and to comply with the Board's probation program, quarterly reports of compliance, and cost recovery.

7. **RESTITUTION** – Respondent shall make restitution to \_\_\_\_\_ in the amount of \$\_\_\_\_\_ within \_\_\_\_\_ calendar days after the effective date of this Decision. Failure to make restitution by this deadline shall be considered a violation of probation. Respondent shall send proof of repayment, such as receipts or a copy of repayment, to the Board or its designee in writing by mail, email, or in person within 30 calendar days after repayment.

(**Note:** BPC section 143.5 prohibits the ordering of restitution in cases based on a complaint or report that has also been the subject of a civil action and that has been settled for monetary damages providing for full and final satisfaction of the parties.)

8. **COST RECOVERY** – Respondent shall pay the Board its costs and charges of investigating and enforcing this matter in the amount of \$\_\_\_\_\_ in \_\_\_\_\_ (insert number of payments here) equal, consecutive quarterly payments of \$\_\_\_\_\_ per payment by mail or in person unless otherwise agreed to by the Board or its designee. The first payment shall be due within 30 calendar days after the effective date of this Decision and Order. Each required quarterly payment shall be due within 90 calendar days after the prior quarterly payment. Any payment that is not received within those 90 calendar days shall be considered late. Any late payments shall be a violation of probation.

Failure to reimburse the Board's enforcement costs shall constitute a violation of probation unless the Board or its designee agrees to payment by an

installment plan because of Respondent's financial hardship in writing by mail or email. Any and all requests for a payment plan shall be submitted by Respondent in writing by mail, email, or in person to the Board or its designee. The Board shall advise Respondent whether or not the payment plan is approved in writing by mail or email within 30 calendar days after the date of Respondent's request for approval. If approved by the Board or its designee, Respondent shall make payments pursuant to a payment plan specified by the Board or its designee taking into consideration all of the following: (1) Respondent's ability to pay, (2) the total amount of cost recovery owed, and (3) the length of the probationary period. Respondent shall make the check or money order payable to the Court Reporters Board of California and shall indicate on the check or money order the following: "Cost Recovery: Case Number \_\_\_\_\_."

- 9. PROBATION VIOLATION** – If Respondent violates probation in any respect, including noncompliance with any Standard Condition or applicable Optional Condition of probation, after giving Respondent ten (10) calendar days' written notice by mail or email and an opportunity to be heard at a formal hearing, it is recommended that the Board shall revoke probation and impose the disciplinary order that was stayed (suspension or revocation of Respondent's license). If an Accusation or Petition to Revoke probation is filed against Respondent's license or the Attorney General's Office has been requested to prepare such Accusation or Petition during the period of probation, the Board shall have continuing jurisdiction until the matter is final, and the period of probation shall be automatically extended and shall not expire until the Accusation or Petition has been acted on by the Board and the matter is final.
- 10. LICENSE SURRENDER WHILE ON PROBATION** – Following the effective date of this probation, if Respondent ceases practicing due to retirement, health reasons, or is otherwise unable to satisfy the terms and conditions of probation, Respondent may request the voluntary surrender of their license to the Board in writing by mail, email, or in person. Respondent's written request to surrender their license shall include the following: their name, license number, case number, address of record, and an explanation of the reason(s) why Respondent seeks to surrender their license.

The Board reserves the right to evaluate the Respondent's request and to exercise its discretion whether to grant the request or to take any other action deemed appropriate and reasonable under the circumstances. The Board will consider whether the request would compromise public protection under the following circumstances: when Respondent has (1) an unsatisfied cost recovery, fine, or restitution order; (2) an Accusation or Petition to Revoke probation that has been served on Respondent alleging violations of this probation; or (3) an unresolved complaint or investigation pending with the Board. Respondent shall not be relieved of the requirements of their probation unless the Board or its designee notifies Respondent that Respondent's request to surrender their license has been accepted in writing by mail or email. Upon formal acceptance of the surrender, Respondent shall deliver

their certificate(s) to the Board or its designee by mail or in person within 15 calendar days and shall no longer practice. Respondent will no longer be subject to the terms and conditions of probation, and the surrender of Respondent's license shall be deemed disciplinary action.

If Respondent re-applies for a license with this Board, the application shall be treated as a petition for reinstatement of a revoked license provided the reinstatement petition is submitted to and approved by the Board within three (3) years after the license expiration date of the revoked license (see Item B – Petition for Reinstatement under Chapter VI – Model Orders).

- 11. PROBATION COMPLETION** – Upon successful completion of probation, any revocation or suspension order that was stayed shall be removed and Respondent's license shall be fully restored.
- 12. CRIMINAL PROBATION** – If Respondent is on criminal probation or parole for the acts upon which disciplinary action is based, Respondent shall submit written reports from the criminal court probation officer or other similar supervisory officer assigned to Respondent regarding Respondent's progress during criminal probation or parole to the Board or its designee by mail, email, or in person. Reports shall be filed quarterly and continue to be filed until Respondent is no longer on criminal probation or the Board's probation is terminated, whichever occurs first. Quarterly reporting shall be consistent with the guidelines set forth in Standard Condition 3 to comply with the conditions of the probation program.

Respondent shall provide a copy of the conditions of any criminal probation/parole applicable to Respondent and the name and contact information of any probation, parole, or similar supervisory officer assigned to Respondent to the Board or its designee in writing by mail, email, or in person within ten (10) calendar days after the effective date of this Decision. Respondent shall provide a copy of all criminal probation/parole reports to the Board by mail, email, or in person within ten (10) calendar days after such report is issued. Failure to timely make any of the submissions required hereby within ten (10) calendar days shall be considered a violation of probation.

If on criminal probation or parole, Respondent shall provide their probation or parole officer with written notice of the Board's decision in this case by mail or email within 15 calendar days after the effective date of this Decision, which shall include a copy of the Board's Accusation or Statement of Issues, as applicable, and this Decision and Order. The notice to Respondent's parole or probation officer shall also provide the parole or probation officer with the name, title, telephone number, and email address for the Board's staff person who is Respondent's probation monitor. Respondent shall provide a copy of this mailed written notification or email to the Board or its designee by mail, email, or in person within 15 calendar days after the mailed written notification or email is circulated. Failure to timely make any of the submissions required hereby within 15 calendar days shall be considered a violation of probation.

- 13. NOTIFY EMPLOYEES** – (This condition only applies to licensees who operate reporting firms.) Respondent shall circulate a copy of the Accusation or Statement of Issues, as applicable, and this Decision and Order to all employees in writing by mail or email within 30 calendar days after the effective date of this Decision. “Employees” as used in this provision includes all full-time, part-time, temporary, and relief employees and independent contractors that Respondent employs or hires at any time during probation. Respondent shall provide a copy of this mailed written notification or email to the Board or its designee by mail, email, or in person within ten (10) calendar days after the mailed written notification or email is circulated.
- 14. NOTIFY OWNERS, OFFICERS** – (This condition only applies to licensees who operate reporting firms.) Respondent shall submit a copy of the Board's Decision and Order with the Accusation or Statement of Issues, as applicable, to the owners, officers, or any owner or holder of 10% or more of the interest in Respondent or Respondent's stock in writing by mail or email within 30 calendar days after the effective date of this Decision. The notification to owners or officers shall also include the name, title, telephone number, and email address for the Board's staff person who is Respondent's probation monitor. Respondent shall provide a copy of this mailed written notification or email to the Board or its designee by mail, email, or in person within ten (10) calendar days after the mailed written notification or email is circulated.
- 15. ADVERTISING APPROVAL** – (This condition only applies to licensees who operate reporting firms.) Respondent shall submit any proposed advertising copy, whether revised or new, and a written request for approval of such advertising to the Board or its designee by mail, email, or in person at least 30 calendar days prior to its intended use. Any such copy must comply with CCR section 2406 and contain Respondent's license number to be approved by the Board or its designee prior to use. The Board shall advise Respondent whether or not the proposed advertising is approved in writing by mail or email within 30 calendar days after the date of Respondent's request for approval.

**B. Optional Conditions of Probation**

*Terms and conditions to be included in orders of probation based upon the violation, circumstances of the case, or the Respondent.*

During the period of probation:

- 1. NOTIFY EMPLOYER/FIRM** – Respondent shall notify the employer or owner of any court reporting firm with which Respondent is associated or subcontracted of the decision in Case Number \_\_\_\_\_ and the terms, conditions, and restrictions imposed on Respondent by this Decision by mail, email, or in person within 30 calendar days after the effective date of this Decision. At a minimum, notification to the employer or firm shall be accomplished by providing each employer or firm with a copy of the Board's Decision and Order with the Accusation or Statement of Issues, as applicable. The notification to employers or firms shall also include the name, title,



telephone number, and email address for the Board's staff person who is Respondent's probation monitor.

Respondent shall submit written proof, such as a copy of the written notice of their probationary status, to the Board or its designee by mail, email, or in person within 30 calendar days after Respondent provided written notice of their probationary status to their employer or court reporting firm with which they are associated or subcontracted and within 15 calendar days after Respondent has undertaken new employment or associated with a different court reporting firm during the term of probation. "Associated" shall mean employment of any kind, including any full-time, part-time, temporary, or relief employment or any position for which a court reporter's license is a requirement or criterion for employment, whether the Respondent is an employee, independent contractor, or volunteer.

- 2. REHABILITATION PROGRAM** – Respondent shall submit the name, address, telephone number, and description of a rehabilitation program for the abuse of drugs or alcohol, or both, in which Respondent will participate to the Board or its designee for its prior approval by mail, email, or in person within 30 calendar days after the effective date of this Decision. The Board shall advise Respondent whether or not the rehabilitation program is approved in writing by mail or email within 30 calendar days after the date of Respondent's request for approval (the Board will verify that the program is legitimate and, for example, licensed with the California Board of Behavioral Sciences, if applicable). Respondent shall commence the rehabilitation program within 30 calendar days after the Board approved the program and provide a copy of certification of successful completion of the rehabilitation program to the Board or its designee by mail, email, or in person within 30 calendar days after completing the rehabilitation program. Respondent shall bear the costs for the rehabilitation program.
- 3. MEDICAL EVALUATION/TREATMENT** – After receiving a written notice containing a list of approved physicians from the Board by mail or email, Respondent shall undergo a medical evaluation by a Board-approved physician within 30 calendar days after the effective date of this Decision and on a periodic basis thereafter. The evaluating physician shall furnish a written medical report to the Board or its designee by mail, email, or in person within 30 calendar days after the evaluation and on a periodic basis thereafter, no less than quarterly, or as may be required by the Board or its designee. Respondent shall execute a release authorizing the evaluator to furnish the Board or its designee with a current diagnosis and a written report regarding the Respondent's ability to function independently with safety to the public by mail, email, or in person. The Board and its designee shall treat the evaluation as confidential. Respondent shall bear the cost of the evaluation. Failure to undergo a medical evaluation by a Board-approved physician within 30 calendar days after the effective date of this Decision and on a periodic basis thereafter shall result in violation of probation.

If Respondent is required by the Board to undergo physical or mental treatment, Respondent shall submit the name and qualifications of a physician or psychotherapist of Respondent's choice to the Board or its designee for its prior approval by mail, email, or in person within 30 calendar days after written notice from the Board or its designee by mail or email. The Board shall advise Respondent whether or not the physician or psychotherapist is approved in writing by mail or email within 30 calendar days after the date of Respondent's request for approval (the Board will verify that the treating physician or psychotherapist is actively licensed in good standing [i.e., no disciplinary action within the last five (5) years] with the applicable professional state licensing agency and does not have a current or prior personal relationship with Respondent). Respondent shall undergo and continue medical treatment within 30 calendar days after the Board's written approval of the treating physician or psychotherapist until further written notice from the Board or its designee by mail or email. Respondent shall have the treating physician submit written quarterly reports regarding treatment progress to the Board or its designee by mail, email, or in person. Quarterly reporting shall be consistent with the guidelines set forth in Standard Condition 3 to comply with the conditions of the probation program. Respondent shall execute a release authorizing the treating physician or psychotherapist to furnish the Board or its designee with a current diagnosis and a written report regarding the Respondent's treatment progress by mail, email, or in person. The Board and its designee shall treat the treatment information as confidential. Respondent shall bear the cost of the treatment. Failure to timely submit a request for approval of a physician or psychotherapist to the Board within 30 calendar days after written notice from the Board or its designee or to schedule physical or mental treatment within 30 calendar days after the Board's written approval of the treating physician or psychotherapist shall result in violation of probation.

If Respondent is determined to be unable to practice safely, the licensed physician or psychotherapist making this determination shall notify the Board or its designee and Respondent by telephone within five (5) calendar days, and the Board shall request that the Attorney General's Office prepare an Accusation or Petition to Revoke probation. Respondent shall immediately cease practice upon written notice by the Board or its designee by mail or email and shall not resume practice until notified in writing by the Board or its designee by mail or email. During this period of nonpractice, Respondent shall not engage in any practice for which a license issued by the Board is required until the Board or its designee has notified Respondent in writing by mail or email that a medical determination permits Respondent to resume practice. This period of nonpractice shall not apply to the reduction of this probationary time period.

4. **PSYCHOLOGICAL EVALUATION** – (To be used in cases involving a crime for which sex offender registration is required pursuant to Penal Code section 290, a serious felony as defined in Penal Code section 1192.7, or a history of drug/alcohol abuse or violence. For the purposes of these Guidelines, a history of drug/alcohol abuse or violence shall be based on an evaluation by

the Board of evidence indicating Respondent may have physical or mental ailment(s) or condition(s), including an addiction, that contributed to the violation(s) or when the same is alleged by Respondent to be a contributing factor to the violation(s).) Respondent shall undergo psychological evaluation by a licensed psychologist or psychiatrist, or both, as approved by the Board within 30 calendar days after written notice from the Board or its designee by mail or email and on a periodic basis thereafter or as required by the Board or its designee. Respondent shall submit the name and qualifications of a licensed psychologist or psychiatrist, or both, of Respondent's choice to the Board or its designee for its prior approval by mail, email, or in person within 30 calendar days after the effective date of this Decision. The Board shall determine if the psychologist or psychiatrist is actively licensed in good standing (i.e., no disciplinary action within the last five (5) years) with the applicable professional state licensing agency and does not have a current or prior personal relationship with Respondent. The Board shall advise Respondent whether or not the evaluating psychologist or psychiatrist is approved in writing by mail or email within 30 calendar days after the date of Respondent's request for approval. The evaluator shall furnish a written report regarding Respondent's judgment, ability to function independently and safely, and whether they pose a threat to the public to the Board or its designee by mail, email, or in person within 30 calendar days after the psychological evaluation. Respondent shall execute a release authorizing the evaluator to furnish the Board or its designee with a current diagnosis and a written report regarding the Respondent's ability to function independently with safety to the public by mail, email, or in person. The Board and its designee shall treat the evaluation as confidential. Respondent shall bear the cost of the evaluation. Failure to timely submit a request for approval of a licensed psychologist or psychiatrist, or both, to the Board within 30 calendar days after the effective date of this Decision or to schedule a mental examination within 30 calendar days after the Board's written approval of the evaluating psychologist or psychiatrist shall result in violation of probation.

If the licensed mental health care practitioner determines the Respondent to be unable to practice safely, the licensed mental health care practitioner making this determination shall notify the Board or its designee and Respondent by telephone within five (5) calendar days, and the Board shall request that the Attorney General's Office prepare an Accusation or Petition to Revoke probation. Respondent shall immediately cease practice upon written notice by the Board or its designee by mail or email and shall not resume practice until notified in writing by the Board or its designee by mail or email. During this period of nonpractice, Respondent shall not engage in any practice for which a license issued by the Board is required until the Board or its designee has notified Respondent in writing by mail or email that a mental health determination permits Respondent to resume practice. This period of nonpractice shall not apply to the reduction of this probationary time period.

5. **PSYCHOTHERAPY** – (To be used in cases involving a crime for which sex offender registration is required pursuant to Penal Code section 290, a serious felony as defined in Penal Code section 1192.7, or a history of



drug/alcohol abuse or violence. For the purposes of these Guidelines, a history of drug/alcohol abuse or violence shall be based on an evaluation by the Board of evidence indicating Respondent may have physical or mental ailment(s) or condition(s), including an addiction, that contributed to the violation(s) or when the same is alleged by Respondent to be a contributing factor to the violation(s).) Respondent shall submit the name and qualifications of one or more therapists of Respondent's choice to the Board or its designee for its prior approval by mail, email, or in person within 30 calendar days after the effective date of this Decision. The therapist shall possess a valid California license in good standing (i.e., no disciplinary action within the last five (5) years) with the applicable professional state licensing agency and shall have had no prior business, professional, or personal relationship with Respondent. The Board shall advise Respondent whether or not the therapist is approved in writing by mail or email within 30 calendar days after the date of Respondent's request for approval. Respondent shall undergo and continue treatment within 30 calendar days after the Board's written approval of the treating therapist until the Board determines that no further psychotherapy is necessary and notifies Respondent of such in writing by mail or email. Respondent shall have the treating therapist submit quarterly written reports regarding Respondent's judgment, ability to function independently and safely, and whether they pose a threat to the public to the Board or its designee by mail, email, or in person. Quarterly reporting shall be consistent with the guidelines set forth in Standard Condition 3 to comply with the conditions of the probation program. Respondent shall execute a release authorizing the therapist to furnish the Board or its designee with a current diagnosis and a written report regarding the Respondent's ability to function independently with safety to the public by mail, email, or in person. The Board and its designee shall treat the therapy information as confidential. Respondent shall bear all costs of therapy. Failure to undergo and continue treatment within 30 calendar days after the Board's written approval of the treating therapist shall result in violation of probation.

If the treating therapist determines the Respondent to be unable to practice safely, the licensed mental health care practitioner making this determination shall notify the Board or its designee and Respondent by telephone within five (5) calendar days, and the Board shall request that the Attorney General's Office prepare an Accusation or Petition to Revoke probation. Respondent shall immediately cease practice upon written notice by the Board or its designee by mail or email and shall not resume practice until notified in writing by the Board or its designee by mail or email. During this period of nonpractice, Respondent shall not engage in any practice for which a license issued by the Board is required until the Board or its designee has notified Respondent in writing by mail or email that a mental health determination permits Respondent to resume practice. This period of nonpractice shall not apply to the reduction of this probationary time period.

- 6. ATTEND COURSES** – Respondent shall attend a court reporting school recognized by the Board pursuant to CCR section 2411 and successfully complete a final examination in one or more specified courses as determined

in this Decision, for example, deposition procedures or ethics, depending on the nature of the violation(s). Respondent shall provide the Board or its designee with proof of successful completion, such as a copy of a certification of completion or transcript, by mail, email, or in person within 30 calendar days after completing the specified course(s). Respondent shall bear the costs of the course(s).

7. **RETAKE LICENSING EXAMINATION** – Respondent shall pass the (name of examination part(s)) part(s) of the next regularly scheduled licensing examination administration after the effective date of this Decision. The Board shall order and notify Respondent in writing by mail or email to cease practice upon any written notice of failure of the examination until Respondent takes and passes the same (name of examination part(s)) part(s) at a subsequent examination administration. Respondent shall bear the costs of the examination(s).
8. **PROOF OF ADVERTISING CORRECTION** – Respondent shall correct any advertisement not compliant with CCR section 2406 within 30 calendar days after the effective date of this Decision. Respondent shall not practice until proof of correction, for example, a screenshot of website or print copy, has been submitted to the Board or its designee by mail, email, or in person, and the Board or its designee has notified Respondent that they may resume practice in writing by mail or email within 30 calendar days after the date of Respondent's submission of proof.
9. **REIMBURSEMENT OF PROBATION PROGRAM** – Respondent shall reimburse the Board for the hourly costs it incurs in monitoring the probation to ensure compliance for the duration of the probation period by mail or in person. Reimbursement costs shall be \$\_\_\_\_\_ per year/\$\_\_\_\_\_ per month. Respondent shall make the check or money order payable to the Court Reporters Board of California and shall indicate on the check or money order the following: "Probation Program Reimbursement: Case Number \_\_\_\_\_."
10. **ABSTAIN FROM DRUGS / SUBMIT TO BIOLOGICAL FLUID TESTING** – (To be used in cases involving a history of drug abuse or based on an evaluation by the Board of evidence indicating Respondent may have physical or mental ailment(s) or condition(s), including an addiction, that contributed to the violation(s) or when the same is alleged by Respondent to be a contributing factor to the violation(s).) Respondent shall completely abstain from the use or possession of controlled substances as defined in the California Uniform Controlled Substances Act (Health and Safety Code, Division 10, commencing with section 11000) and dangerous drugs as defined in BPC section 4022 during the period of probation except when lawfully prescribed or ordered by a licensed practitioner for a bona fide illness or medical condition. Respondent shall submit to biological fluid testing or other required drug screening, or both, at Respondent's cost within five (5) calendar days after written request by the Board or its designee by mail or email. The length of time and frequency of testing shall be determined by the

Board. Respondent shall ensure that written reports are submitted directly by the testing agency to the Board or its designee by mail, email, or in person within 30 calendar days after the date of testing. There shall be no confidentiality in test results. Any confirmed positive finding shall constitute a violation of probation.

[**Note:** If this Optional Condition is included in the probationary order, then Optional Condition 11 “Abstain from Use of Alcohol/Submit to Biological Fluid Testing” should also be included to ensure abstention occurs from all addictive substances during the period of probation when a history of drug abuse is found.]

- 11. ABSTAIN FROM USE OF ALCOHOL / SUBMIT TO BIOLOGICAL FLUID TESTING** – (To be used in cases involving a history of alcohol abuse or based on an evaluation by the Board of evidence indicating Respondent may have physical or mental ailment(s) or condition(s), including an addiction, that contributed to the violation(s) or when the same is alleged by Respondent to be a contributing factor to the violation(s).) Respondent shall completely abstain from the use of alcoholic beverages during the period of probation. Respondent shall submit to biological fluid testing at Respondent's cost within five (5) calendar days after written request by the Board or its designee by mail or email. The length of time and frequency of testing shall be determined by the Board. Respondent shall ensure that written reports are submitted directly by the testing agency to the Board or its designee by mail, email, or in person within 30 calendar days after the date of testing. There shall be no confidentiality in test results. Any confirmed positive finding shall constitute a violation of probation.

[**Note:** If this Optional Condition is included in the probationary order, then Optional Condition 10 “Abstain from Drugs/Submit to Biological Fluid Testing” should also be included to ensure abstention occurs from all addictive substances during the period of probation when a history of alcohol abuse is found.]

- 12. PROVISION OF RECORDS** – Respondent shall provide specific records for inspection by the Board or its designee by mail, email, or in person within 30 calendar days after directed in writing by the Board or its designee by mail or email.
- 13. “Actual Revocation”** – To be included in “Stayed Revocation” cases as an Optional Condition in the event of probation violation.
- 14. “Actual Suspension”** – To be included in “Stayed Suspension” cases as an Optional Condition in the event of probation violation.

## VI. Model Orders

### A. Licensee

#### Revocation of License

License Number \_\_\_\_\_, issued to Respondent \_\_\_\_\_, is revoked.

Respondent shall relinquish and forward or deliver their pocket license(s) to practice and wall certificate(s) to the Board by mail or in person within ten (10) calendar days after the effective date of this Decision. Respondent may not reapply or petition the Board for reinstatement of their revoked license or reduction of penalty for one (1) year after the effective date of this Decision pursuant to Government Code section 11522 and may not petition the Board for reinstatement of their revoked license after three (3) or more years after the license expiration date of the revoked license pursuant to BPC section 8024.5. Respondent shall pay the Board its costs of investigation and prosecution in the amount of \$\_\_\_\_\_ by mail or in person within 30 calendar days after the effective date of this Decision.

Option: As a condition precedent to reinstatement of their revoked license, Respondent shall reimburse the Board for its costs of investigation and prosecution in the amount of \$\_\_\_\_\_ and pay the reinstatement fee required by BPC section 8024.4. Said amount shall be paid in full by mail or in person prior to the reinstatement of Respondent's license unless otherwise ordered by the Board.

#### Suspension of License

License Number \_\_\_\_\_, issued to Respondent \_\_\_\_\_, is suspended for a period of \_\_\_\_\_ calendar days.

Respondent shall relinquish and forward or deliver their pocket license(s) to practice and wall certificate(s) to the Board by mail or in person within ten (10) calendar days after the effective date of this Decision. Respondent may not reapply or petition the Board for reinstatement of their suspended license or reduction of penalty for one (1) year after the effective date of this Decision pursuant to Government Code section 11522. Respondent shall pay the Board its costs of investigation and prosecution in the amount of \$\_\_\_\_\_ by mail or in person within 30 calendar days after the effective date of this Decision.

#### Revocation Stayed and Licensee Placed on Probation

License Number \_\_\_\_\_, issued to Respondent \_\_\_\_\_, is revoked; however, the revocation is stayed, and Respondent is placed on probation for \_\_\_\_\_ year(s) on the following terms and conditions: (list all Standard and applicable Optional Conditions of probation).

If a licensee violates the order of probation, the stay is lifted, and it is recommended that an actual revocation be imposed.

### **Suspension Stayed and Licensee Placed on Probation**

License Number \_\_\_\_\_, issued to Respondent \_\_\_\_\_, is suspended for a period of \_\_\_\_\_ calendar days; however, the suspension is stayed, and Respondent is placed on probation for \_\_\_\_\_ year(s) on the following terms and conditions: (list all Standard and applicable Optional Conditions of probation).

If a licensee violates the order of probation, the stay is lifted, and it is recommended that a one-year actual suspension be imposed.

### **Public Reprimand**

License Number \_\_\_\_\_, issued to Respondent \_\_\_\_\_, is publicly reprimanded. This reprimand constitutes disciplinary action by the Board and shall become a part of Respondent's license history with the Board.

### **Surrender of License in Lieu of Revocation**

Respondent \_\_\_\_\_ surrenders License Number \_\_\_\_\_ as of the effective date of this Decision. Respondent shall relinquish and forward or deliver their pocket license(s) to practice and wall certificate(s) to the Board by mail or in person within ten (10) calendar days after the effective date of this Decision. The surrender of Respondent's license and the acceptance of the surrendered license by the Board shall constitute the imposition of discipline against Respondent. This Decision constitutes disciplinary action by the Board and shall become a part of Respondent's license history with the Board.

### **B. Petition for Reinstatement**

Respondent may petition the Board for reinstatement of their revoked license after not less than one (1) year has elapsed after the effective date of this Decision.

A license that is not renewed within three (3) years after its expiration date may not be renewed, restored, reinstated, or reissued thereafter. Therefore, Respondents whose revoked licenses have not been renewed for three (3) or more years are not eligible for license reinstatement and would have to apply, qualify, and meet all requirements for a new original license, including paying all fees and taking and passing the licensing examination.

### **Grant Petition with No Restrictions on License**

The Petition for Reinstatement filed by Petitioner \_\_\_\_\_ is hereby granted, and Petitioner's License Number \_\_\_\_\_ shall be fully restored.

### **Grant Petition and Place Licensee on Probation**

The Petition for Reinstatement filed by Petitioner \_\_\_\_\_ is hereby granted, and Petitioner's License Number \_\_\_\_\_ shall be reinstated and immediately revoked; however, the revocation shall be stayed, and the Petitioner shall be placed on probation for a period of \_\_\_\_\_ year(s) on the following terms and conditions: (list all Standard and applicable Optional Conditions of probation).

### **Grant Petition and Place Licensee on Probation After Completion of Conditions Precedent**

The Petition for Reinstatement filed by Petitioner \_\_\_\_\_ is hereby granted, and Petitioner's License Number \_\_\_\_\_ shall be reinstated upon completion of the following conditions precedent: (examples would be paying restitution, cost reimbursement, completion of ethics course, physical examination, completion of rehabilitation program, take and pass licensing examination).

Upon completion of the conditions precedent above and satisfaction of all statutory and regulatory requirements for issuance of a license, Petitioner's License Number \_\_\_\_\_ shall be reinstated and immediately revoked; however, the revocation shall be stayed, and Petitioner shall be placed on probation for a period of \_\_\_\_\_ year(s) on the following terms and conditions: (list all Standard and applicable Optional Conditions of probation).

### **Deny Petition**

The Petition for Reinstatement filed by Petitioner \_\_\_\_\_, for License Number \_\_\_\_\_, is hereby denied.

### **C. Petition to Revoke Probation/Revocation of Probation**

License Number \_\_\_\_\_, issued to Respondent \_\_\_\_\_, is revoked. Petitioner is not eligible to apply for reinstatement for one (1) year after the effective date of this Decision pursuant to Government Code section 11522 and is not eligible for reinstatement of their revoked license after three (3) or more years after the license expiration date of the revoked license pursuant to BPC section 8024.5.

### **Extension of Probation**

License Number \_\_\_\_\_, issued to Respondent \_\_\_\_\_, is revoked; however, the revocation is stayed, and Respondent is placed on probation for an additional \_\_\_\_\_ year(s) on the following terms and conditions: (list all Standard and applicable Optional Conditions of probation).

### **D. Applicant**

(To be used in cases where a Statement of Issues has been filed.)

### **Grant Application with No Restrictions on License**

The application filed by Respondent \_\_\_\_\_ for initial licensure is hereby granted, and a court reporter's license shall be issued to Respondent upon successful completion of all licensing requirements, including payment of all fees.

### **Grant Application and Place Licensee on Probation**

The application filed by Respondent \_\_\_\_\_ for initial licensure is hereby granted, and a court reporter's license shall be issued to Respondent upon successful completion of all licensing requirements, including payment of all fees. However, the license shall be immediately revoked, the revocation shall be stayed, and Respondent shall be placed on probation for \_\_\_\_\_ year(s) on the following terms and conditions: (list all Standard and applicable Optional Conditions of probation).



### **Grant Application and Place Licensee on Probation After Completion of Conditions Precedent**

The application filed by Respondent \_\_\_\_\_ for initial licensure is hereby granted, and a court reporter's license shall be issued to Respondent upon completion of the following conditions precedent: (examples would be paying restitution, cost recovery, completion of continuing education, completion of rehabilitation program, take and pass licensing examination).

Upon completion of the conditions precedent above and successful completion of all licensing requirements, including payment of all fees, Respondent shall be issued a court reporter's license. However, the license shall be immediately revoked, the revocation shall be stayed, and Respondent shall be placed on probation for \_\_\_\_\_ year(s) on the following terms and conditions: (list all Standard and applicable Optional Conditions of probation).

### **Deny Application**

The application filed by Respondent \_\_\_\_\_ for initial licensure is hereby denied.

DEPARTMENT OF CONSUMER AFFAIRS  
**TITLE 16. COURT REPORTERS BOARD OF CALIFORNIA**

**PROPOSED REGULATORY LANGUAGE**  
**Transcript Reimbursement Fund Application**

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**Article 6**

**Adopt section 2452 of Division 24 of Title 16 of the California Code of Regulations to read as follows:**

**§ 2452. Transcript Reimbursement Fund Application.**

In accordance with Business and Professions Code (BPC) sections 8030.6 and 8030.8, applicants applying to receive funds from the Transcript Reimbursement Fund (TRF) established in BPC section 8030.2 shall submit a TRF application on a form created by the Board that shall include the information below and the related supporting documentation described below to the Board by mail to its mailing address listed on the Board's website, by email to the email address listed on the Board's website, or in person to the Board's street address listed on the Board's website.

- (a) A completed TRF application for litigants who are representing themselves shall include the following information:
- (1) Applicant's (litigant's) full legal name (last name) (first name) (middle name);
  - (2) Applicant's mailing address, city, state, and ZIP code;
  - (3) Applicant's telephone number;
  - (4) Applicant's fax number, if any;
  - (5) Applicant's email address;
  - (6) Affirmation that applicant's court-approved fee waiver is attached;
  - (7) Case name;
  - (8) County, court, and/or judicial district where filed;
  - (9) Court case file number;
  - (10) Whether an appeal is pending, and, if yes, the appeal number;



- (11) Whether the applicant has submitted a TRF request in this case previously;
- (12) Type of civil case;
- (13) Certified Shorthand Reporter (CSR) number;
- (14) CSR name;
- (15) Date of court or deposition proceeding;
- (16) Whether preparation was of original transcript, original and one copy, or copy only;
- (17) Whether per diem was included;
- (18) Whether the applicant has paid for the transcript and is seeking reimbursement and the cost as stated in an itemized invoice from the CSR, or the applicant has not paid and is seeking payment directly to the CSR and the cost as estimated by the CSR; and
- (19) A signed and dated statement by the applicant that all statements made in the application are true and correct.

(b) In addition to the TRF application information required under subdivision (a), a completed TRF application for those who are representing indigent litigants pro bono shall include the following information:

- (1) Pro bono entity's name;
- (2) Pro bono entity's mailing address, city, state, and ZIP code;
- (3) Pro bono entity's telephone number;
- (4) Pro bono entity's fax number;
- (5) Pro bono entity's email address;
- (6) Name of attorney handling case;
- (7) Attorney's mailing address, city, state, and ZIP code;
- (8) Attorney's telephone number;
- (9) Attorney's fax number;
- (10) Attorney's email address;
- (11) Whether the attorney is employed with, referred by, or has other relationship with the qualifying nonprofit entity;
- (12) By which section of the BPC the applicant is claiming eligibility;
- (13) Whether litigant is indigent as defined in BPC section 8030.4 (f);

- (14) Whether litigant is plaintiff, defendant, or other;
- (15) By which subparagraph(s) of BPC section 8030.4(e) the applicant is claiming the case is not fee-generating; and
- (16) Whether represented party entered into any contract that contains any type of contingency fee agreement or clause.

NOTE: Authority cited: Section 8007, Business and Professions Code. Reference: Sections 8030.2, 8030.4, 8030.6, and 8030.8, Business and Professions Code.

DEPARTMENT OF CONSUMER AFFAIRS  
**TITLE 16. COURT REPORTERS BOARD OF CALIFORNIA**

**PROPOSED REGULATORY LANGUAGE**  
**Transcript Reimbursement Fund Application and Applicant Privacy**

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**Article 1**

**Adopt section 2410 of Division 24 of Title 16 of the California Code of Regulations to read as follows:**

**§ 2410. Transcript Reimbursement Fund Application and Applicant Privacy.**

In accordance with Business and Professions Code (BPC) sections 8030.6 and 8030.8, applicants applying to receive funds from the Transcript Reimbursement Fund (TRF) established in BPC section 8030.2 shall submit a TRF application on a form created by the Board that shall include the information below and the related supporting documentation described below to the Board by mail to its mailing address listed on the Board's website, by email to the email address listed on the Board's website, or in person to the Board's street address as listed on the Board's website.

- (a) A completed TRF application for litigants who are representing themselves shall include the following information:
- (1) Applicant's (litigant's) full legal name (last name) (first name) (middle name);
  - (2) Applicant's mailing address, city, state, and ZIP code;
  - (3) Applicant's telephone number;
  - (4) Applicant's fax number, if any;
  - (5) Applicant's email address;
  - (6) Affirmation that applicant's court-approved fee waiver is attached;
  - (7) Case name;
  - (8) County, court, and/or judicial district where filed;
  - (9) Court case file number;
  - (10) Whether an appeal is pending, and, if yes, the appeal number;

- (11) Whether the applicant has submitted a TRF request in this case previously;
- (12) Type of civil case;
- (13) Certified Shorthand Reporter (CSR) number;
- (14) CSR name;
- (15) Date of court or deposition proceeding;
- (16) Whether preparation was of original transcript, original and one copy, or copy only;
- (17) Whether per diem was included;
- (18) Whether the applicant has paid for the transcript and is seeking reimbursement and the cost as stated in an itemized invoice from the CSR, or the applicant has not paid and is seeking payment directly to the CSR and the cost as estimated by the CSR; and
- (19) A signed and dated statement by the applicant that all statements made in the application are true and correct.

(b) In addition to the TRF application information required under subdivision (a), a completed TRF application for those who are representing indigent litigants pro bono shall include the following information:

- (1) Pro bono entity's name;
- (2) Pro bono entity's mailing address, city, state, and ZIP code;
- (3) Pro bono entity's telephone number;
- (4) Pro bono entity's fax number;
- (5) Pro bono entity's email address;
- (6) Name of attorney handling case;
- (7) Attorney's mailing address, city, state, and ZIP code;
- (8) Attorney's telephone number;
- (9) Attorney's fax number;
- (10) Attorney's email address;
- (11) Whether the attorney is employed with, referred by, or has other relationship with the qualifying nonprofit entity;
- (12) By which section of the BPC the applicant is claiming eligibility;
- (13) Whether litigant is indigent as defined in BPC section 8030.4 (f);

- (14) Whether litigant is plaintiff, defendant, or other;
- (15) By which subparagraph(s) of BPC section 8030.4(e) the applicant is claiming the case is not fee-generating; and
- (16) Whether represented party entered into any contract that contains any type of contingency fee agreement or clause.

(c) The following information provided by or relating to an applicant applying to receive funds from the Transcript Reimbursement Fund, or relating to the represented party in the case of a pro bono attorney applicant, shall be considered personal information pursuant to the Information Practices Act of 1977 (Division 3 [commencing with section 1798] of Title 1.8 of the Civil Code) and shall not be subject to public disclosure under the California Public Records Act (Division 10 [commencing with section 7920.000] of Title 1 of the Government Code):

- (1) Litigant's name;
- (2) Litigant's mailing address, city, state, and ZIP code;
- (3) Litigant's telephone number;
- (4) Litigant's email address;
- (5) Litigant's fax number (if provided);
- (6) Case name;
- (7) Court case file number; and
- (8) Appeal number (if provided).

NOTE: Authority cited: Section 8007, Business and Professions Code. Reference: Sections 8030.2, 8030.4, 8030.6, and 8030.8, Business and Professions Code; Sections 1798.3 and 1798.24, Civil Code; and Section 7920.000, et seq., Title 1, Government Code.

DEPARTMENT OF CONSUMER AFFAIRS  
**TITLE 16. COURT REPORTERS BOARD OF CALIFORNIA**

**PROPOSED REGULATORY LANGUAGE**  
**Examinations and Applications**

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**Article 2**

**Amend Section 2412 of Division 24 of Title 16 of the California Code of Regulations to read as follows:**

**§ 2412. Qualifier Examinations.**

Schools are prohibited from requiring more than one qualifier examination as defined: The qualifier examination shall consist of unfamiliar material. The material shall be 4-voice testimony of 10-minute duration, dictated at 200 words per minute, and graded at 97.595% accuracy, ~~and~~ in accordance with the method by which the ~~h~~Board grades the licensing examination. Schools shall date and number each qualifier and announce such date and number to the students at the time of administering the qualifier. Schools shall record the following information for each qualifier, for each date on which it was administered, 1) the actual duration of the dictated test, 2) the number of students that took the test, 3) the number of students that transcribed the test, and 4) the number of students that passed the test. The school shall maintain the qualifier and catalogue the required information related to each qualifier test for a period of not less than three (3) years for the purpose of inspection by the Board. Qualifiers shall not be dictated more than once in any twelve-month period.

Note: Authority cited: Section 8007, Business and Professions Code. Reference: Sections 8007, 8020.5, and 8027, Business and Professions Code.

## Article 3

### **Amend Section 2418 of Division 24 of Title 16 of the California Code of Regulations to read as follows:**

#### **§ 2418. Examination Application.**

(a) Application for examination shall be made on a form prescribed by the ~~b~~Board, accompanied by such evidence, statements, or documents as are therein required and by the required fee. An application for examination shall be filed with the ~~b~~Board's through the Board's online portal accessible through the Board's website principal office not less than ~~forty-five~~thirty (30) calendar days prior to the date set for the examination for which the applicant wishes to be scheduled. In addition to other information required by federal or California law, a completed application for examination of first-time, re-examination, additional certification, three-year application fee and examination, and previously licensed applicants shall include the following information, as applicable:

(1) Applicant's full legal name (first, middle, and last names);

(2) Applicant's Social Security Number or Individual Taxpayer Identification Number;

(3) Applicant's date of birth;

(4) Applicant's public street address, city, county, state, and ZIP code (first-time applicants only);

(5) Applicant's mailing street address, city, county, state, and ZIP code;

(6) Applicant's telephone number;

(7) Applicant's public email address (first-time and previously licensed applicants only);

(8) Applicant's personal email address;

(9) Whether the applicant has previously applied for the California certified shorthand reporter (CSR) examination and not been issued a CSR license (first-time applicants only);

(10) Whether the applicant graduated from high school and, if yes, the name, city, and state of the high school and the date of graduation (first-time applicants only);

(11) The method by which the applicant is qualifying for the licensing examination, for example, Board-recognized court reporting school, work experience, National Court

Reporters Association (NCRA) certificate, or National Verbatim Reporters Association (NVRA) certificate (first-time and additional certification applicants only);

(12) Applicant's previous CSR license number and date issued (additional certification and previously licensed applicants only);

(13) The method by which the applicant will be certified, for example, steno machine writer or voice writer;

(14) Whether the applicant has ever been licensed as a CSR in another state;

(15) Whether the applicant is a California resident (first-time and previously licensed applicants only);

(16) Whether the applicant has submitted fingerprints to the Board through Live Scan;

(17) The part(s) of the examination for which the applicant is applying;

(18) Whether the applicant is serving, or has previously served, in the United States Armed Forces for the purpose of applying military experience and training towards licensure requirements, if applicable. If the applicant affirmatively states they meet this criterion, they shall provide documentary evidence showing such military service, experience, and training to be applied towards licensure requirements;

(19) The following additional applicant-identifying information to expedite the application process, if applicable:

(A) Whether the applicant is an honorably discharged member of the United States Armed Forces. If the applicant affirmatively states they meet this criterion, they shall provide the following documentation with the application to receive expedited review: a certificate of release or discharge from active duty (DD-214) or other documentary evidence showing date and type of discharge.

(B) Whether the applicant is an active duty member of a regular component of the United States Armed Forces enrolled in the United States Department of Defense SkillBridge program as authorized under Section 1143(e) of Title 10 of the United States Code. If the applicant affirmatively states they meet this criterion, they shall provide documentary evidence showing such enrollment with the application to receive expedited review.

(C) Whether the applicant is married to or in a domestic partnership or other legal union with an active duty member of the United States Armed Forces assigned to a duty station in California under official active duty military orders. If the applicant affirmatively states they meet this criterion, they shall provide the following documentation along with



the application to receive expedited review and waiver of the licensure application fee and the initial license fee: certificate of marriage, certificate of domestic partnership, or proof of other legal union; a copy of the applicant's spouse's or partner's military orders reflecting assignment to a California duty station; and proof of being currently licensed to practice shorthand reporting in another state, district, or territory of the United States.

(D) Whether the applicant was admitted to the United States as a refugee, has been granted asylum by the Secretary of Homeland Security or the Attorney General of the United States, or has a special immigrant visa (SIV). If the applicant affirmatively states they meet any of these criteria, they shall provide any of the following items of documentation, as applicable, with the application to receive expedited review:

(i) Form I-94, arrival/departure record, with an admission class code such as "RE" (refugee) or "AY" (asylee) or other information designating the person a refugee or asylee,

(ii) Special immigrant visa that includes the "SI" or "SQ" admission class code,

(iii) Permanent Resident Card (Form I-551), commonly known as a "green card," with a category designation indicating that the person was admitted as a refugee or asylee, or

(iv) An order from a court of competent jurisdiction or other documentary evidence that provides reasonable assurances to the Board that the applicant qualifies for expedited licensure pursuant to Section 135.4 of the Code.

(20) A statement certifying that the applicant will abide by the laws, regulations, and standards of practice applicable to businesses that render shorthand reporting services pursuant to Section 13401 of the Corporations Code, except for the requirements of Sections 8040 and 8044 of the Code;

(21) A statement under penalty of perjury under the laws of the State of California declaring that the information provided in the application is true and correct; and

(22) Applicant's signature and date.

(b) To be eligible for examination, an applicant must present evidence satisfactory to the Board of having met one of the requirements enumerated in Section 8020 of the Code within five years immediately preceding the date of the applicant's most recent application for examination or re-examination.

(\* \* \* \*)

(e) A person seeking to qualify under the "equivalent proficiency" provision of subsection (b) of Section 8020 of the Code shall submit with their application a

certificate from a recognized court reporting school evidencing equivalent proficiency in lieu of completion of the minimum prescribed course of study in a recognized court reporting school. Such certificate shall also attest to the applicant's ability to make a verbatim record of unfamiliar material, ~~with four voice dictation, at a speed of 200 words per minute for ten minutes with a minimum of 97.5 percent accuracy and shall be known as a "qualifier" graded in accordance with the method by which the board grades the licensing examination as demonstrated by taking and passing the qualifier examination as defined in Section 2412 of this chapter.~~

(f) A person seeking to qualify under the "certificate" provision of subsection (c) of Section 8020 of the Code shall submit with their application evidence that the applicant possesses a Registered Professional Reporter certificate from NCRA or a Certified Verbatim Reporter or Certified Verbatim Reporter – Stenotype certificate from NVRA.

~~(g)~~ (f) A person seeking to qualify under the "valid license" provision of subsection ~~(d)~~ of Section 8020 of the Code shall submit with their application evidence that the applicant possesses an out-of-state license issued pursuant to a statute after completion of all statutory requirements of that state and that is in full force and effect at the time the application is filed with the ~~b~~Board.

Note: Authority cited: Section 8007, Business and Professions Code. Reference: Sections 30, 114.5, 115.4, 115.5, 135.4, 8007, 8017, 8020, 8020.5, 8022, 8024.9, and 8027, and 8031, Business and Professions Code; and Section 13401, Corporations Code.

**Amend Section 2420 of Division 24 of Title 16 of the California Code of Regulations to read as follows:**

**§ 2420. Examination Required; Passing Grades; Results Notification; Conditional Examination Credit.**

(a) The examination shall consist of three divisible parts:

(\* \* \* \*)

The passing grades for the Dictation/Transcription part of the examination is ~~97.5~~95%. The passing grades for the two written knowledge parts of the examination (English and Professional Practice) shall be determined by the Angoff criterion-referenced method. Such passing scores may vary moderately with changes in test composition. Any examinee who obtains a grade which equals or exceeds the passing score determined by the Angoff method will be deemed to have passed the applicable portion of the examination, assuming the other requirements of this section are met.

(b) The ~~b~~Board shall notify each examinee in writing of their pass/fail examination results.

(\* \* \* \*)

(f) The period of time designated in subsection (c) may be extended by the ~~b~~Board for a period of time not to exceed one (1) year upon the showing of extraordinary extenuating circumstances.

Note: Authority cited: Section 8007, Business and Professions Code. Reference: Sections 135, 8020, 8020.5, and 8023, Business and Professions Code.

#### **Article 4**

**Add Section 2431 of Division 24 of Title 16 of the California Code of Regulations to read as follows:**

#### **§ 2431. Certified Shorthand Reporter Initial Licensure Application.**

(a) Application for initial licensure of a certified shorthand reporter shall be made on a form prescribed by the Board and submitted to the Board through the Board's online portal accessible through the Board's website, accompanied by such evidence, statements, or documents as are therein required and by the required fee. In addition to other information required by federal or California law, a completed application for initial licensure of a certified shorthand reporter shall include the following information:

(1) Applicant's full legal name (first, middle, and last names);

(2) Applicant's Social Security Number or Individual Taxpayer Identification Number;

(3) Applicant's date of birth;

(4) Applicant's public street address, city, county, state, and ZIP code;

(5) Applicant's mailing street address, city, county, state, and ZIP code;

(6) Applicant's telephone number and an optional alternate phone number;

(7) Applicant's public email address;

(8) Applicant's personal email address;

(9) Whether the applicant is serving, or has previously served, in the United States Armed Forces for the purpose of applying military experience and training towards

licensure requirements, if applicable. If the applicant affirmatively states they meet this criterion, they shall provide documentary evidence showing such military service, experience, and training to be applied towards licensure requirements;

(10) A statement certifying under penalty of perjury under the laws of the State of California that the information provided in the application is true, correct, and complete to the best of the applicant's knowledge;

(11) A statement certifying that the applicant personally read and completed the application; and

(12) Applicant's signature and date.

Note: Authority cited: Section 8007, Business and Professions Code. Reference: Sections 30, 114.5, 8007, 8020, 8022, 8023, 8024, 8024.1, 8024.9, and 8031, Business and Professions Code.

**Add Section 2432 of Division 24 of Title 16 of the California Code of Regulations to read as follows:**

**§ 2432. Court Reporting Firm Initial Registration Application.**

(a) Application for voluntary initial registration of a court reporting firm that is wholly owned by one or more California certified shorthand reporters (CSR) shall be made on a form prescribed by the Board and submitted to the Board through the Board's online portal accessible through the Board's website, accompanied by such evidence, statements, or documents as are therein required. In addition to other information required by federal or California law, a completed application for initial registration of a court reporting firm shall include the following information:

(1) Applicant firm's company name;

(2) Applicant firm's Social Security Number or Federal Employer Identification Number;

(3) Applicant firm's mailing street address, city, county, state, and ZIP code;

(4) Applicant firm's telephone number;

(5) Applicant firm's personal email address;

(6) Applicant firm's public email address;

(7) Whether the applicant firm is a sole proprietorship, partnership, corporation, limited liability company, or other;

(8) California CSR information, including full legal name, license number, percentage of ownership, and action to be taken (associate or deassociate);

(9) A statement declaring that the information provided in the application is true and correct;

(10) A statement acknowledging that the applicant has reviewed all applicable laws and regulations;

(11) A statement acknowledging that the court reporting firm utilizes California CSRs to cover judicial proceedings in California;

(12) A statement acknowledging that the court reporting firm will provide a California CSR when the witness is in California; and

(13) Applicant's signature and date.

Note: Authority cited: Section 8007, Business and Professions Code. Reference: Sections 30, 8007, 8024.9, 8040, 8043, and 8044, Business and Professions Code.

**Add Section 2433 of Division 24 of Title 16 of the California Code of Regulations to read as follows:**

**§ 2433. Non-Shorthand Reporting Corporation Entity Initial Registration Application.**

(a) Application for initial registration of an entity that is not a shorthand reporting corporation owned by a California certified shorthand reporter (CSR) shall be made on a form prescribed by the Board and submitted to the Board through the Board's online portal accessible through the Board's website, accompanied by such evidence, statements, or documents as are therein required and by the required fee. In addition to other information required by federal or California law, a completed application for initial registration of an entity that is not a shorthand reporting corporation shall include the following information:

(1) Applicant entity's full company name;

(2) Applicant entity's Federal Employer Identification Number;

(3) Applicant entity's street mailing address, city, county, state, and ZIP code;

(4) Applicant entity's telephone number;

(5) Applicant entity's public email address;

(6) Applicant entity's personal email address;

(7) Reporter-in-charge's legal name (first and last names);

(8) Reporter-in-charge's license number and action to be taken (associate or deassociate);

(9) Whether the applicant entity is a sole proprietorship, partnership, corporation, or other;

(10) Whether the applicant entity, a controlling officer or parent corporation, its designated certified reporter-in-charge, or any of its officers, employees, or independent contractors have been subject to any enforcement action relating to the provision of court reporting services by a state or federal agency within five years before submitting the initial registration application;

(11) Whether the applicant entity, within five years before submitting the initial registration application, has settled or been adjudged to have liability for a civil complaint alleging the entity or the entity's reporter-in-charge engaged in misconduct relating to the provision of court reporting services for more than fifty thousand dollars (\$50,000);

(12) A statement declaring that the information provided in the application is true and correct;

(13) A statement acknowledging that the applicant entity has reviewed all applicable laws and regulations;

(14) A statement acknowledging that the applicant entity utilizes California CSRs to cover judicial proceedings in California;

(15) A statement acknowledging that the applicant entity will provide a California CSR when the witness is in California;

(16) Applicant entity's signature and date;

(17) A statement certifying that the applicant entity will abide by the laws, regulations, and standards of practice applicable to businesses that render shorthand reporting services pursuant to Section 13401 of the Corporations Code, except for the requirements of Sections 8040 and 8044 of the Business and Professions Code, and declaring under penalty of perjury under the laws of the State of California that the information provided in the application is true and correct; and

(18) Reporter-in-charge's signature and date.

Note: Authority cited: Section 8007, Business and Professions Code. Reference: Sections 30, 8007, 8024.9, 8031, and 8051, Business and Professions Code; and Section 13401, Corporations Code.

**Add Section 2434 of Division 24 of Title 16 of the California Code of Regulations to read as follows:**

**§ 2434. Certified Shorthand Reporter License Renewal Application.**

(a) Application for renewal of a certified shorthand reporter license shall be made on a form prescribed by the Board and submitted to the Board through the Board's online portal accessible through the Board's website, accompanied by such evidence, statements, or documents as are therein required and by the required fee. In addition to other information required by federal or California law, a completed application for renewal of a certified shorthand reporter license shall include the following information:

(1) Applicant's full legal name (first, middle, and last names);

(2) Applicant's Social Security Number or Individual Taxpayer Identification Number;

(3) Applicant's date of birth;

(4) Applicant's public street address, city, county, state, and ZIP code;

(5) Applicant's mailing street address, city, county, state, and ZIP code;

(6) Applicant's telephone number and an optional alternate phone number;

(7) Applicant's public email address;

(8) Applicant's personal email address;

(9) Whether the applicant, since they last renewed their license, has been convicted of or pled guilty or nolo contendere to any violation of any law of any state, the United States, or a foreign country or had any conviction that has been dismissed under Section 1203.4 of the Penal Code (except for minor traffic violations), or had any disciplinary action (excluding citations and fines) taken against the applicant by a licensing/regulatory agency in this or any other state;

(10) Whether the applicant has been called to active duty as a member of the United States military or California National Guard for the purpose of receiving a waiver of their

renewal fees, if applicable. If the applicant affirmatively states they meet this criterion, they shall provide documentary evidence that substantiates the licensee's active duty service with the application to receive a renewal fee waiver;

(11) A statement certifying under penalty of perjury under the laws of the State of California that the information provided in the application is true, correct, and complete to the best of the applicant's knowledge;

(12) A statement certifying that the applicant personally read and completed the application; and

(13) Applicant's signature and date.

Note: Authority cited: Section 8007, Business and Professions Code. Reference: Sections 30, 114.3, 8007, 8008, 8024, 8024.2, 8024.3, 8024.5, 8024.9, and 8031, Business and Professions Code; and Section 1203.4, Penal Code.

**Add Section 2435 of Division 24 of Title 16 of the California Code of Regulations to read as follows:**

**§ 2435. Court Reporting Firm Registration Renewal Application.**

(a) Application for voluntary renewal of a court reporting firm registration shall be made on a form prescribed by the Board and submitted to the Board through the Board's online portal accessible through the Board's website, accompanied by such evidence, statements, or documents as are therein required. In addition to other information required by federal or California law, a completed application for renewal of a court reporting firm registration shall include the following information:

(1) Applicant firm's full company name;

(2) Applicant firm's Social Security Number or Federal Employer Identification Number;

(3) Applicant firm's public address, city, county, state, and ZIP code;

(4) Applicant firm's telephone number and an optional alternate phone number;

(5) Applicant firm's public email address;

(6) Applicant firm's personal email address;

(7) Whether the California certified shorthand reporter on record with the Board is still the applicant firm's current certified shorthand reporter, and whether their information is



still current, including full legal name, license number, percentage of ownership, and action to be taken (associate or deassociate);

(8) A statement certifying under penalty of perjury under the laws of the State of California that the information provided in the application is true, correct, and complete to the best of the applicant's knowledge;

(9) A statement certifying that the applicant personally read and completed the application; and

(10) Applicant's signature and date.

Note: Authority cited: Section 8007, Business and Professions Code. Reference: Sections 30, 8007, and 8008, Business and Professions Code.

**Add Section 2436 of Division 24 of Title 16 of the California Code of Regulations to read as follows:**

**§ 2436. Non-Shorthand Reporting Corporation Entity Registration Renewal Application.**

(a) Application for renewal of a registration of an entity that is not a shorthand reporting corporation shall be made on a form prescribed by the Board and submitted to the Board through the Board's online portal accessible through the Board's website, accompanied by such evidence, statements, or documents as are therein required and by the required fee. In addition to other information required by federal or California law, a completed application for registration renewal of an entity that is not a shorthand reporting corporation shall include the following information:

(1) Applicant entity's full company name;

(2) Applicant entity's Federal Employer Identification Number;

(3) Applicant entity's public address, city, county, state, and ZIP code;

(4) Applicant entity's telephone number and an optional alternate phone number;

(5) Applicant entity's public email address;

(6) Applicant entity's personal email address;

(7) Whether the reporter-in-charge on record with the Board is still the applicant entity's current reporter-in-charge, and whether their information is still current, including full legal name, license number, and action to be taken (associate or deassociate);

(8) A statement certifying under penalty of perjury under the laws of the State of California that the information provided in the application is true, correct, and complete to the best of the applicant's knowledge;

(9) A statement certifying that the applicant personally read and completed the application; and

(10) Applicant's signature and date.

Note: Authority cited: Section 8007, Business and Professions Code. Reference: Sections 30, 8007, 8008, 8031, and 8051, Business and Professions Code.

COURT REPORTERS BOARD MEETING – AUGUST 21, 2026

**AGENDA ITEM 8 – Skills Exam Grading Policies**

=====

Agenda Description: Discussion and possible action to approve graders' recommendations

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Brief Summary:

A review of the grading policies for the skills exam resulted in a proposed change in the Speaker Identification Errors section on page of the attachment.

=====

Support Documents:

Attachment – Examination Grading Policies for Skills Portion

=====

Recommended Board Action: Staff recommends the Board review and approved the proposed changes.

Sample Motion: I move that the Board approve (as amended) the proposed Examination Grading Policies.



DEPARTMENT OF CONSUMER AFFAIRS

## COURT REPORTERS BOARD OF CALIFORNIA

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Attachment  
Agenda Item 8

### EXAMINATION GRADING POLICIES FOR SKILLS PORTION

Please note tests submitted with all uppercase or all lowercase letters will NOT be graded.

The following list of errors will be used as a guideline for correcting tests.

#### DICTIONARY RESEARCH

A word list will be provided for the dictation/transcription part of the exam. When there is a need to research a word -- spelling, hyphenation, one word/two words -- during transcription, the most recent Merriam-Webster hard copy dictionary is to be used. It is used by graders as the final authority for the spelling/form of a word.

Common variants of proper names not included on the word list will be accepted but must be spelled consistently throughout the transcript.

#### WORD ERRORS

Omitted Word(s): Each word that is dictated and not transcribed is counted as one error.

|              |                                                                           |
|--------------|---------------------------------------------------------------------------|
| DICTATED:    | The <b>car on the right began</b> to slide as it rounded the corner.      |
| TRANSCRIBED: | The <b>car began</b> to slide as it rounded the corner.<br>(three errors) |

Wrong Word(s): Each word that is dictated and incorrectly transcribed is counted as one error.

|              |                                                                                    |
|--------------|------------------------------------------------------------------------------------|
| DICTATED:    | The car on <b>the</b> right began to slide as it rounded the corner.               |
| TRANSCRIBED: | The car on <b>my</b> right began to slide as it rounded the corner.<br>(one error) |

Inserted Word(s): Each word that was not dictated but was transcribed (as opposed to words that were incorrectly transcribed) is counted as one error.

|              |                                                                                          |
|--------------|------------------------------------------------------------------------------------------|
| DICTATED:    | The car on the <b>right began</b> to slide as it rounded the corner.                     |
| TRANSCRIBED: | The car on the <b>right side began</b> to slide as it rounded the corner.<br>(one error) |

Misspelled Words: Each misspelled word is counted as one error. If the same word is misspelled the same way throughout the transcript, it is counted as one error in each instance it is misspelled.

|              |                                                             |
|--------------|-------------------------------------------------------------|
| DICTATED:    | It does not fall into that <b>category</b> .                |
| TRANSCRIBED: | It does not fall into that <b>catagory</b> .<br>(one error) |

DICTATED: There has been **definite** improvement, but I cannot be **definite** about the **definite** areas where it still needs work.  
TRANSCRIBED: There has been **definate** improvement, but I cannot be **definate** about the **definate** areas where it still needs work.  
(one error)

DICTATED: There has been **definite** improvement, but I cannot be **definite** about the **definite** areas where it still needs work.  
TRANSCRIBED: There has been **definate** improvement, but I cannot be **definite** about the **definate** areas where it still needs work.  
(two errors)

Transposed Words: Transposing adjacent words (or numbers) is counted as one error.

DICTATED: It was a **dark, stormy** night.  
TRANSCRIBED: It was a **stormy, dark** night.  
(one error)

DICTATED: My address is 56**34** Broadway.  
TRANSCRIBED: My address is 56**43** Broadway.  
(one error)

Hyphenated Words: Each word on either side of a hyphen counts as one word; e.g., *part-time* is two words, and *brother-in-law* is three words. One error is charged for any one wrong word in a hyphenated combination. (Compound words which are separate words -- e.g., *real estate* is two words, and *editor in chief* is three words -- are counted the same way.)

DICTATED: She had a **part-time** job.  
TRANSCRIBED: She had a **full-time** job.  
(one error)

DICTATED: My **brother-in-law** said it was not important.  
TRANSCRIBED: My **brothers-in-laws** said it was not important.  
(two errors)

Missing hyphens in a compound adjective will NOT be counted as an error.

DICTATED: We returned from a **two-week** vacation.  
TRANSCRIBED: We returned from a **two week** vacation.  
(no error)

Compound Words: Each compound word written as two words and vice versa is counted as one error.

DICTATED: We left a message on their **voicemail**.  
TRANSCRIBED: We left a message on their **voice mail**.  
(one error)

## SPEAKER IDENTIFICATION ERRORS:

Identifying the wrong speaker is counted as five errors. When the same speaker error is repeated in the same series, no further errors are counted.

Inserting a speaker who did not speak at all or inserting the wrong speaker is counted as five errors.

Omitting a speaker is counted as five errors.

Omitting or inserting an incorrect Q or A is counted as ~~one error~~ five errors.

Failing to indicate the questioning attorney when coming out of colloquy is counted as five errors.

(Gender) If a male speaker is indicated with a female title, one error is counted. This is counted as one error regardless of the number of times the wrong indication is used.

|              |                                                                               |
|--------------|-------------------------------------------------------------------------------|
| DICTATED:    | <b>MR.</b> JOHNSON: Your Honor, I have just five minutes more.                |
| TRANSCRIBED: | <b>MS.</b> JOHNSON: Your Honor. I have just five minutes more.<br>(one error) |

## CONTRACTIONS

Contractions are avoided in the dictation portion of the exam. If one is used, either the separate word form or the contracted form will be considered to be correct.

|              |                                                                                                                                       |
|--------------|---------------------------------------------------------------------------------------------------------------------------------------|
| DICTATED:    | She <b>wasn't</b> a part of the team at that time.                                                                                    |
| TRANSCRIBED: | She <b>wasn't</b> a part of the team at that time.<br>(no error)<br>She <b>was not</b> a part of the team at that time.<br>(no error) |

## FEMALE TITLES IN FRONT OF NAMES

No error will be counted for transcribing Miss as Ms. and vice versa.

## NUMBERS

Numbers may be transcribed as words or in figures/digits. If digits are used, each digit is counted as one word. If a digit is incorrect, one error is counted; If a digit is omitted or an extra digit is added, one error is counted. (For information on transposing numbers, see "Transposed Words" under "Word Errors.")

DICTATED: There were **425** cartons delivered on Friday.  
TRANSCRIBED: There were **424** cartons delivered on Friday.  
(one error)

DICTATED: There were **425** cartons delivered on Friday.  
TRANSCRIBED: There were **4245** cartons delivered on Friday.  
(one error)

Fractions may be written as words or with numerals: one-half or  $\frac{1}{2}$ .

The use of the \$ symbol is acceptable for the word “dollars”: \$25 or twenty-five dollars.

## **CAPITALIZATION**

Failure to capitalize the first word in a sentence is counted as one error.

Failure to capitalize a proper noun is counted as one error.

## **WHAT IS NOT AN ERROR:**

Dictated words or phrases not in the dictionary.

COURT REPORTERS BOARD MEETING – AUGUST 21, 2026

**AGENDA ITEM 9 – Court Reporter Workforce Development and Pipeline**

=====

Agenda Description:

Discussion and possible action on court reporting industry workforce.

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Brief Summary:

The Board has requested an update on workforce trends and information.

=====

Support Documents: None

=====

Fiscal Impact: None

=====

Recommended Board Action: Informational only.

=====



## COURT REPORTERS BOARD MEETING – AUGUST 21, 2026

### AGENDA ITEM 10 – DEPOSITION INTERNSHIP HOURS

#### Agenda Description:

Discussion and possible action regarding reported educational deficits of newly licensed reporters, specifically as relates to the requirements set forth in California Code of Regulations Title 16, Division 24, Article 2, section 2411(h)(2).

#### Brief Summary:

The California Court Reporters Association (CCRA) is proposing an educational program designed to provide participants with an alternative option to meet the minimum 10 hours of deposition interning required under Title 16, Division 24, Article 2, section 2411(h)(2). The program will combine a live, recorded deposition along with demonstration, hands-on opportunities, and interactive discussions to reinforce California deposition reporting standards and professional practices.

Following is section (h) of CCR Title 16, Division 24, Article 2:

#### (h) Apprenticeship Training

##### *60 hours*

*(1) Before the student attains a proficiency of 120 words per minute, the student shall observe a minimum of five hours of proceedings in a court of record. After attaining a proficiency of 120 words per minute and before attaining a proficiency of 180 words per minute, the student shall observe a minimum of five hours of proceedings in a court of record.*

*(2) When the student reaches a proficiency of 180 words per minute, the student shall sit in and report with a certified shorthand reporter 40 hours of court proceedings or depositions of which a minimum of 10 hours shall be in depositions and a minimum of 10 hours shall be in court.*

*A maximum of 10 hours of this training may be gained in reporting mock proceedings sponsored by a law firm or by a law school.*

*(3) The student shall be required to transcribe and submit to the school for approval a minimum of 20 consecutive pages from stenographic or voice notes taken at a court proceeding and a minimum of 20 consecutive pages from stenographic or voice notes taken at a deposition in compliance with the Minimum Transcript Format Standards.*

*(4) After attaining a speed of 160 words per minute, the student shall receive a minimum of 10 hours additional instruction to review the following categories:*

*(A) Court and deposition procedures*

*(B) Professional practice and ethics, including the Professional Standards of Practice*

*(C) Legal research and the California Codes*

*(D) Job preparation skills including professional appearance and etiquette, attitude and demeanor, interviewing skills, and resume writing.*

=====  
Support Documents:

Attachment – CCRA Internship Program Proposal  
=====

Fiscal Impact: None  
=====

Recommended Board Action: Staff recommends the Board review the proposal to provide an alternate way to achieve deposition internship hours.

If the Board wishes to move forward with the proposal, regulatory changes would need to be made. If proposing to move forward here is a sample motion:

Sample Motion: I move that the Board approve CCRA’s proposal and direct staff to bring back proposed regulatory language for Board consideration.

CALIFORNIA COURT REPORTERS ASSOCIATION  
INTERNSHIP PROGRAM PROPOSAL - OUTLINE

**Submitted to:** Court Reporters Board of California

**Program Title:** CCRA's PATH Program: Professional Apprenticeship Training Hours.

**Program Outline:** From Notice to Transcript: An In-Person Pre-Recorded Deposition.

**Program Format:** In-Person CSR-moderated deposition training offered multiple times per year throughout California.

**Program Purpose:** This educational program is designed to provide participants with an alternative option to meet the minimum 10 hours of deposition interning required under Title 16, Division 24, Article 2, Section 2411(h)(2). The program will combine a live, recorded deposition along with demonstration, hands-on opportunities, and interactive discussions to reinforce California deposition reporting standards and professional practices.

**Learning Objectives:**

1. Identify the responsibilities of the California Certified Shorthand Reporter before, during, and after a deposition.
2. Recognize proper deposition procedures, administration of oaths, exhibit handling, read-back requests, stipulations, and objections.
3. Apply professional and ethical standards to common deposition scenarios.
4. Analyze transcript formatting requirements and best practices.
5. Identify and resolve challenges encountered during real-world deposition proceedings.
6. Demonstrate understanding of transcript production, certification, and record management requirements.

## **Program Agenda:**

- I. Introduction and Overview
  - Welcome and program objectives
  - Sign-in and sign-out requirements
  - Overview of California deposition practices
  - Role and responsibilities of the Certified Shorthand Reporter
  - Introduction to the recorded deposition scenario and layout
- II. Pre-Deposition Preparation
  - How to read a deposition job assignment
  - Equipment and technology preparation
  - Exhibit management procedures
  - Professional conduct expectations
- III. Guided Viewing – Part One of the Pre-Recorded Deposition
  - Introduction to the videographer
  - Requirements for stating name and license number on the record
  - Swearing of the Interpreter
  - Swearing of the Witness
  - Marking and handling exhibits
  - Read-back requests
- IV. Guided Viewing – Part Two of the Pre-Recorded Deposition
  - Managing difficult participants
  - Confidentiality obligations
  - Ethical considerations during depositions
  - Off-the-record discussions
  - Clarification of testimony
- V. Guided Viewing – Part Three of the Pre-Recorded Deposition

- Interpreter issues
- Handling interruptions and overlapping speakers
- Remote participation considerations

VI. Guided Viewing – Part Four of the Pre-Recorded Deposition

- Review of sample transcript generated from the deposition
- Formatting standards
- Parentheticals and colloquy
- Exhibit indexing
- Certification language
- Common transcript errors and corrections

VII. Question-and-Answer Session and Program Assessment

- Participant questions
- Knowledge assessment
- Program evaluation
- Instruction materials with school requirements

VIII. Participants will receive:

- CCRA's Deposition Guide
- Deposition transcript excerpts
- Sample Exhibits
- Relevant statutory and regulatory references
- Voice volume monitoring and notification

IX. Method of Attendance Verification:

- In-person sign-in and sign-out logs approved by the California CSR in attendance
- Attendance monitoring throughout the program
- Completion of program evaluation
- Certification of earned hours

Program will be presented by experienced California Certified Shorthand Reporters and subject-matter experts with deposition reporting experience.

**Expected Outcome:**

- Participants will earn deposition internship hours to count toward their required hours of training.
- Participants will gain practical knowledge of deposition procedures, transcript preparation, and professional standards through observation and analysis of an actual deposition scenario presented in a structured educational setting.

COURT REPORTERS BOARD MEETING – AUGUST 21, 2026

**AGENDA ITEM 11 – CREDENTIALING TASK FORCE**

=====

Agenda Description:

Discussion and possible action regarding court reporting instructor credentialing.

=====

Brief Summary:

At the October 17, 2025, Board meeting, Chair Tugade appointed Board Member Heatherlynn Gonzalez to chair a task force to explore ways to streamline credentialing for court reporting instructors.

=====

Support Documents: None

=====

Fiscal Impact: None

=====

Recommended Board Action: Staff recommends the Board direct the task force to explore next steps for the community college system.

Sample Motion: I move that the Board direct the Credentialing Task Force to contact schools within the community college system and further explore options to assist with the credentialing path.

COURT REPORTERS BOARD MEETING – AUGUST 21, 2026

**AGENDA ITEM 12 – Strategic Plan**

=====

Agenda Description: Update to the Board on action plan

=====

Brief Summary:

At the December 13, 2023, Board meeting, the Board adopted the 2024-2028 Strategic Plan. The Action Plan Timeline is used as a tool to update the Board on the progress of achieving the strategic plan goals.

=====

Support Documents:

Attachment – Action Plan Timeline

=====

Fiscal Impact: None

=====

Recommended Board Action: Staff recommends the Board review the Action Plan Timeline and provide feedback as needed.



## Court Reporters Board of California 2024 – 2028 Action Plan Timeline

| Action Items |                                                                                                                                                   | Target Date | Status                                                                  |
|--------------|---------------------------------------------------------------------------------------------------------------------------------------------------|-------------|-------------------------------------------------------------------------|
| 2.1          | Pursue legislation that will require Certified Shorthand Reporter (CSRs) to state their license number at the beginning of proceedings.           | Oct 2024    | September 2024 (eff. January 2025)                                      |
| 4.6          | Pursue legislation that will require licensees to provide an email address to the Board for the delivery of electronic communication and updates. | Oct 2024    | September 2024 (eff. January 2025)                                      |
| 1.1          | Pursue reciprocity with other state and national exams to reduce barriers to licensure.                                                           | Dec 2024    | September 2024 (eff. January 2025)                                      |
| 1.3          | Assess the feasibility of adding one in-person test annually to improve accessibility and inclusivity.                                            | Dec 2024    | November 2024                                                           |
| 4.1          | Increase the Board's visibility to promote consumer awareness about the Board's role and efforts.                                                 | Dec 2024    | Ongoing (social media)                                                  |
| 4.3          | Inform the public about voice writers to create awareness about the new technology, prevent confusion, and better inform consumers.               | Jan 2025    | Voice writing videos published via social media March 2026 and ongoing. |
| 1.7          | Review demographic data provided through the strategic planning process to identify any workforce issues.                                         | March 2025  |                                                                         |
| 4.5          | Attract people to the profession to address the shortage of licensees.                                                                            | June 2025   |                                                                         |
| 4.7          | Update the Board's logo and incorporate voice writing for a more universal and inclusive logo.                                                    | June 2025   | Approved October 2026                                                   |
| 4.8          | Explore the need to increase TRF funding to support program needs and the Board's DEI initiative.                                                 | June 2025   |                                                                         |
| 1.4          | Research the reinstatement of lapsed licenses and determine if statutory changes are necessary.                                                   | July 2025   |                                                                         |
| 1.2          | Change the testing format to conform to universal formats to increase pass rates and the licensee pool.                                           | Dec 2025    | Board approved April 2024. Ongoing.                                     |
| 1.5          | Explore the possibility of provisional licensing to promote fully licensed reporters and address the shortage of licensees.                       | Dec 2025    |                                                                         |
| 4.2          | Address digital recording to educate consumers on the distinction between digital recorders and Certified Shorthand Reporters (CSRs).             | Dec 2025    |                                                                         |

## Court Reporters Board of California 2024 – 2028 Action Plan Timeline

| Action Items |                                                                                                                                                                                            | Target Date | Status                                                    |
|--------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------|-----------------------------------------------------------|
| 4.9          | Review and update the “Best Practice Pointers” on the Board’s website.                                                                                                                     | Dec 2025    | Ongoing. (revisions to existing and newly added May 2025) |
| 3.2          | Obtain data on schools and students to assist the Board with daily operations and to identify any diversity, equity, and inclusion (DEI) and workforce supply issues.                      | June 2026   |                                                           |
| 5.1          | Streamline the Transcript Reimbursement Fund (TRF) process.                                                                                                                                | June 2026   | December 2025                                             |
| 5.3          | Collect data on website traffic to assist the Board in improving website functionality and accessibility for all stakeholders.                                                             | June 2026   |                                                           |
| 3.1          | Explore methods to improve the capturing and communication of statistics on the effectiveness and quality of educational programs.                                                         | Dec 2026    |                                                           |
| 4.4          | Increase awareness and inclusivity of the Transcript Reimbursement Fund (TRF).                                                                                                             | April 2027  |                                                           |
| 5.2          | Create a succession plan for the executive officer position.                                                                                                                               | June 2027   |                                                           |
| 1.6          | Pursue legislation that will require Certified Shorthand Reporters (CSRs) to complete continuing education.                                                                                | Dec 2028    |                                                           |
| 2.2          | Pursue legislation that will grant the Board authority to set standards, license, and oversee digital recording to ensure accurate and timely transcripts for the protection of consumers. | Dec 2028    | 4/2025 – AB 1189 (Lackey)<br>1/2026 – bill died           |

COURT REPORTERS BOARD MEETING – AUGUST 21, 2026

**AGENDA ITEM 13 – Election of Officers**

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Agenda Description: Election of Chair and Vice-Chair.

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Brief Summary:

Per the Board policy annotated below, the election of Board officers shall occur on an annual basis at the first regular meeting of the Board after June 1 of each year. The purpose of this item is to conform to this policy.

**ANNUAL MEETINGS**

The CSR Board shall hold an annual meeting for the purpose of electing a chairperson and a vice-chairperson in accordance with Business and Professions Code, Section 8003. Said annual meeting shall be held at the first regular meeting held after June 1 of each year.

Adopted: August 1987

=====

Support Documents:

Attachment – Chairperson duties.

=====

Recommended Board Action: Hold elections.

## **CERTIFIED SHORTHAND COURT REPORTERS BOARD**

### **Chairperson of the Board**

**Definition:** The Chairperson is responsible for the effective functioning of the Board, the integrity of the Board process, and assuring that the Board fulfills its responsibilities for governance. The Chairperson instills vision, values, and strategic planning in Board policy making. The Chairperson sets an example reflecting the Board's mission as a State licensing and law enforcement agency. The Chairperson optimizes the Board's relationship with its executive officer and the public.

### **Specific Duties and Responsibilities:**

- Chairs meetings to ensure fairness, public input, and due process;
- Prepares Board meeting notices and agendas;
- Appoints Board committees;
- Supports the development and assists performance of Board colleagues;
- Obtains the best thinking and involvement of each Board member. Stimulates each Board member to give their best effort;
- Implements the evaluation of the executive officer to the Board;
- Continually focuses the Board's attention on policy making, governance, and monitoring of staff adherence to and implementation of written Board policies;
- Facilitates the Board's development and monitoring of sound policies that are sufficiently discussed and considered and that have majority Board support;
- Serves as a spokesperson; and
- Is open and available to all Board members, staff and governmental agencies, remaining careful to support and uphold proper management and administrative procedure.

COURT REPORTERS BOARD MEETING – AUGUST 21, 2026

**AGENDA ITEM 14 – Future Meeting Dates**

=====

Agenda Description:    Proposed Meeting Dates

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Support Documents:

Attachment – 2026 & 2027 Board Calendars

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Current scheduled activities:

CSR Dictation Exam:

    November 1 – 22, 2026 – Realtime Coach (Online Vendor)

=====

Recommended Board Action: Informational only. Staff will poll Board member availability for next meeting.

A YEAR-AT-A-GLANCE CALENDAR 2026  
COURT REPORTERS BOARD OF CALIFORNIA

**JANUARY 2026**

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**FEBRUARY 2026**

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| 22 | 23 | 24 | 25 | 26 | 27 | 28 |

**MARCH 2026**

| S           | M  | T  | W  | Th | F  | S  |
|-------------|----|----|----|----|----|----|
| 1           | 2  | 3  | 4  | 5  | 6  | 7  |
| Exam Starts | 8  | 9  | 10 | 11 | 12 | 13 |
| 14          | 15 | 16 | 17 | 18 | 19 | 20 |
| 21          | 22 | 23 | 24 | 25 | 26 | 27 |
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**APRIL 2026**

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**MAY 2026**

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**JUNE 2026**

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**JULY 2026**

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| Exam Starts | 12 | 13 | 14 | 15 | 16 | 17 |
| 18          | 19 | 20 | 21 | 22 | 23 | 24 |
| 25          | 26 | 27 | 28 | 29 | 30 | 31 |

**AUGUST 2026**

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**SEPTEMBER 2026**

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**OCTOBER 2026**

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**NOVEMBER 2026**

| S           | M  | T  | W  | Th | F  | S  |
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| Exam Starts | 8  | 9  | 10 | 11 | 12 | 13 |
| 14          | 15 | 16 | 17 | 18 | 19 | 20 |
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**DECEMBER 2026**

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**ACTIVITY**

|              |                           |
|--------------|---------------------------|
| BD           | Board Meeting or Activity |
| Exam         | Dictation Exam            |
| TF           | Task Force Meeting        |
| TH           | Town Hall Meeting         |
| OA           | Occupational Analysis     |
| RH           | Regulatory Hearing        |
| Shaded Dates | Board Office is Closed    |

**CITY**

|     |             |     |               |
|-----|-------------|-----|---------------|
| LA  | LOS ANGELES | SAC | SACRAMENTO    |
| SD  | SAN DIEGO   | SF  | SAN FRANCISCO |
| ONT | ONTARIO     |     |               |

**GENERAL LOCATION**

|      |                                |
|------|--------------------------------|
| NC   | NORTHERN CALIFORNIA            |
| SC   | SOUTHERN CALIFORNIA            |
| Tele | TELECONFERENCE/VIDEOCONFERENCE |

# A YEAR-AT-A-GLANCE CALENDAR 2027 COURT REPORTERS BOARD OF CALIFORNIA

**JANUARY 2027**

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**FEBRUARY 2027**

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**MARCH 2027**

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| 14 | 15               | 16 | 17 | 18 | 19 | 20 |
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**APRIL 2027**

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**MAY 2027**

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**JUNE 2027**

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**JULY 2027**

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**AUGUST 2027**

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**SEPTEMBER 2027**

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**OCTOBER 2027**

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**NOVEMBER 2027**

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**DECEMBER 2027**

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| ACTIVITY                                                                                                                    |                                       |
|-----------------------------------------------------------------------------------------------------------------------------|---------------------------------------|
| <span style="background-color: #00FF00; border: 1px solid black; display: inline-block; width: 15px; height: 10px;"></span> | BD - Board Meeting or Activity        |
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| <span style="background-color: #FFFF00; border: 1px solid black; display: inline-block; width: 15px; height: 10px;"></span> | TF - Task Force Meeting               |
| <span style="background-color: #D8BFD8; border: 1px solid black; display: inline-block; width: 15px; height: 10px;"></span> | TH - Town Hall Meeting                |
| <span style="background-color: #FF6347; border: 1px solid black; display: inline-block; width: 15px; height: 10px;"></span> | OA - Occupational Analysis            |
| <span style="background-color: #FF00FF; border: 1px solid black; display: inline-block; width: 15px; height: 10px;"></span> | RH - Regulatory Hearing               |
| <span style="background-color: #A9A9A9; border: 1px solid black; display: inline-block; width: 15px; height: 10px;"></span> | Shaded Dates - Board Office is Closed |

| CITY                                  |                  |
|---------------------------------------|------------------|
| LA-LOS ANGELES                        | SAC-SACRAMENTO   |
| SD-SAN DIEGO                          | SF-SAN FRANCISCO |
| ONT- ONTARIO                          |                  |
| GENERAL LOCATION                      |                  |
| NC - NORTHERN CALIFORNIA              |                  |
| SC - SOUTHERN CALIFORNIA              |                  |
| Tele - TELECONFERENCE/VIDEOCONFERENCE |                  |

COURT REPORTERS BOARD MEETING – AUGUST 21, 2026

**AGENDA ITEM 15 – Closed Session**

=====

Agenda Description: Pursuant to Government Code, § [11126\(c\)\(3\)](#), the Board will convene into closed session as needed to discuss or act on disciplinary matters.

=====

Fiscal Impact: None