



# State of California Court Reporters Board of California



## 2023-24 Sunset Review Report

Prepared for  
California Legislature  
Senate Committee on Business, Professions and Economic Development  
Assembly Committee on Business and Professions

# COURT REPORTERS BOARD

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## OF CALIFORNIA

### **Board Members**

#### Chair

Denise Tugade, Public Member

#### Vice Chair

Robin Sunkees, CSR, Licensee Member

#### Members

Laura Brewer, CSR, Licensee Member

Michael Dodge-Nam, Public Member

Arteen Mnayan, Public Member

#### Executive Officer

Yvonne K. Fenner

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# **COURT REPORTERS BOARD**

## **EXECUTIVE SUMMARY**

### **As of December 21, 2023**

Since 1951, the Court Reporters Board of California (Board) has been overseeing the practice of court reporting, largely through licensing and enforcement. Today, there are approximately 5,600 active licensed court reporters in California.

In 2022, the Board began registration of all entities offering court reporting services, ensuring consumers are protected whether they use a licensee-owned or non-licensee-owned firm. There are approximately 210 firms registered.

The Board also has oversight for schools of court reporting. The Board “recognizes” schools rather than licensing them. Only court reporting schools recognized by the Board can certify students to qualify for the license examination. There are eight schools of court reporting recognized by the Board. Six of the schools are public schools, and two are private schools.

Additionally, the Board administers the Transcript Reimbursement Fund (TRF), established in 1981 to aid qualified indigent litigants in civil cases by providing transcript reimbursement funds. To date, the TRF has disbursed over \$9.5 million to California’s indigent population. Transfers are made from the Court Reporters Board Fund to the Transcript Reimbursement Fund in increments of \$100,000 up to \$300,000 per year. In 2021, the Board received a one-time transfer from the General Fund of \$500,000 to help serve as many indigent litigants as possible.

The five-member Board is comprised of two certified shorthand reporters, more commonly known as court reporters, and three public members. The Board is charged with carrying out the duties given to it under Business and Professions Code sections 8007 and 8008. Its legal mandate is to protect consumers by ensuring court reporters possess a minimum level of competency and by disciplining licensees who do not meet their legal obligations. We currently have no vacancies.

### **Examination**

License examinations are conducted three times per year. The three-part exam consists of two written computer-based portions and one practical portion. The first written portion is English, testing a candidate’s knowledge of grammar, punctuation, and vocabulary. The second written portion is professional practice, testing a candidate’s knowledge of statutes and regulations governing the practice of court reporting, as well as legal and medical terminology. The practical portion of the exam is a demonstration of dictation and transcription skills, which requires the candidate to report and transcribe a ten-minute simulated judicial proceeding read by four readers at 200 words per minute. Candidates have two and a half hours to prepare a transcript with a minimum of 97.5 percent accuracy. Beginning in 2020, the skills exam has been offered via a remote platform.

Prior to licensing, court reporters typically complete a recognized program of instruction that includes a minimum of 240 hours of English, 270 hours of medical and legal terminology, court and deposition procedures and ethics, 25 hours of transcript preparation and 60 hours of apprenticeship training.

## **Licensing/Registration**

The initial license fee is \$225 or half that amount, prorated according to the last day of the birth month of the applicant. Thereafter, the annual renewal fee on the licensee's birth month is \$225. The fee for firm registration is \$500.

## **Budget**

The Board's annual operating budget is currently \$1,245,000. Of that, each year by statute, \$300,000 is assigned to the Transcript Reimbursement Fund, a fund designated to reimburse transcript costs incurred by the profession when representing indigent clients. 92% of the revenue is from licensing fees, with the remainder from examination fees and payments from fines. There is no ongoing revenue from the General Fund.

The greatest expenditure for the Board is personnel services, which make up 52% of its budget. Pro rata is the next largest expenditure, which makes up about 13% of the Board's budget.

## **Complaints**

Over the past five years, the Board has received, on average, approximately 120 complaints per year against licensees. The most common complaints involve untimely delivery of transcripts and questions concerning the accuracy of the transcript. An additional 10 to 15 percent are resolved by staff informally mediating the complaint with the complainant and the licensee so that it doesn't reach the formal complaint stage. The Board also takes a proactive stance on preventing complaints by answering many questions from licensees and attorneys by phone and e-mail.

## **Significant Accomplishments**

Despite budgetary challenges, the Board is pleased to report a number of significant accomplishments since the last Sunset Review. The Board conducted an occupational analysis with the assistance of the Office of Professional Examination Services (OPES), the purpose of which is to outline the relevant job tasks and knowledge a new licensee must be able to perform competently. The information gathered via the occupational analysis process allows the Board to ensure the license examinations are testing skills and knowledge that are currently needed in order to be competent entering the profession.

The Board transitioned the skills exam to online administration, eliminating travel costs for candidates and offer cost-saving and time-saving factors for Board staff.

On the legislative front, SB 241 (Umberg) was passed into law in 2021, allowing the Board to register firms. This is a huge step forward for consumer protection as all firms will be held to the same laws regardless of ownership.

Another huge step forward was the addition of voice writers as a method of shorthand reporting to California's licensee base. This method of reporting has revitalized the schools, with many programs experiencing the need for wait listing new students as they hire additional instructors.

## **The Future – Opportunities from Prior Review**

Continuing education has been an issue as far back as in the 1996 Sunset Review Report. In 2008, the Board sponsored a mandatory continuing education bill, AB 2189 (Karnette), which ultimately was

vetoed by the Governor. In 2011, SB 671 (Price), a similar mandatory continuing education bill, made it to the Governor's desk for signature. In 2015, the California Court Reporters Association sponsored AB 804 (Hernandez), a bill that would have required mandatory continuing education for licensure. Ultimately, all three bills were returned to the Legislature without the governor's signature. The Board remains committed to this consumer protection aim.

The Board will continue to explore options for entry-level license examinations with an eye toward offering reciprocity with the skills portion of the license exam. This will not only increase license portability but will help alleviate areas of the market that are suffering a shortage of court reporters.

The Board is looking forward to sharing this report with the Committees and our stakeholders. Protection of the public continues to be the highest priority for the Court Reporters Board of California.

# **COURT REPORTERS BOARD BACKGROUND INFORMATION AND OVERVIEW OF THE CURRENT REGULATORY PROGRAM As of December 21, 2023**

## **Section 1 – Background and Description of the Board and Regulated Profession**

### **Brief History of the Court Reporters Board**

Established in 1951 by the Legislature to protect consumers from incompetent practitioners, the Certified Shorthand Reporters Board, now known as the Court Reporters Board of California (Board), tests, licenses, regulates, investigates, and disciplines members of the court reporting profession.

Court reporters are highly trained professionals who stenographically preserve the words spoken in a wide variety of official legal settings such as court hearings, trials, and other pretrial litigation-related proceedings, namely depositions.

Judicial court reporters work either in courtrooms as official reporters or in the private sector as freelance reporters who provide deposition services as well as reporting civil proceedings in court and arbitrations. These court reporters are officers of the court, and their competence, impartiality and professionalism must be beyond question. A complete and accurate transcript of the proceedings made by an impartial third party is the cornerstone for all appeal rights. It is relied upon by the consumer as an accurate source of information, which includes testimony given under oath.

Particular to criminal cases, courts of appeal rely exclusively upon written briefs and written transcripts of court proceedings to determine whether there were errors in a trial's procedure or errors in the judge's interpretation of the law. A conviction – and thus an accused's freedom or, in some instances, an accused's life – can stand or fall based entirely upon what was said by a witness, a lawyer, a juror, or a judge solely reflected in the written transcript.

In civil cases, millions of dollars, lifelong careers, and the fate of business enterprises can hinge on what was said or what was not said in a deposition or at trial.

Additionally, the testimony in civil and criminal cases is often filled with technical terminology. A medical malpractice case, in which specialist experts on both sides commonly contradict one another, can involve complex technical medical terminology; criminal cases can involve scientific language related to DNA identification; anti-trust cases can involve expert testimony related to complex economic analyses, and so on. No matter how obscure or technical, such jargon must be verbatim in the written transcript, and court reporters must ensure the accuracy of the transcript.

Not only are there complex skills involved in the actual reporting of legal proceedings, but the practice of court reporting is dictated by a multitude of statutes and regulations. In the private sector, freelance court reporters are faced with numerous and increasingly complex ethical issues as these licensees seek to maintain their strict neutrality while working in private settings, which frequently involve contentious, high-stakes litigation.

In addition to judicial court reporters, who must be licensed to practice, another field serviced by court reporters is captioning and communication access realtime translation (CART). Broadcast captioners provide translations for television, sometimes pre-recorded but often realtime as in the case of news and emergency reports. CART reporters provide realtime translation for the deaf and hard-of-hearing community in a variety of settings, from the classroom to sporting events, church services, and theater performances.

Prior to January 1, 1983, state courts had been allowed to use noncertified reporters if they could demonstrate that a certified reporter was not available. Seeing the folly of this practice and serious consumer protection implications, in 1983 B&P Code section 8016 was enacted to require all court reporters working in state court to be licensed. Court reporters hired prior to 1983 can still maintain an exemption to the licensing requirement.

Until the 1960s, the Board allowed only licensed court reporters, known as certified shorthand reporters (CSRs), to own and operate companies offering court reporting services. The practice ceased, and in 1972, the Board began registering shorthand-reporting corporations. That process was rescinded by Assembly Bill 2743 (Chapter 1289, Statutes of 1992) when the Board decided that the registration duplicated the filing required by the Secretary of State's Office. (See Corporations Code section 13401(b) exempting "professional corporations" regulated by the Board from having to register.) Additionally, Corporations Code section 13410(a) requires "professional corporations" (those that provide services for which a license is required) to be "subject to the applicable rules and regulations adopted by, and all the disciplinary provisions of the Business and Professions Code expressly governing the practice of the profession in this state, and to the powers of, the governmental agency regulating the profession in which such corporation is engaged[.]"

Also, in 1972, the Board's authority was expanded to give the Board the responsibility to recognize court reporting schools and to set minimum curriculum standards for court reporting programs. Additional authorization to cite and fine schools was passed by the Legislature in 2002. (B&P Code 8027.5)

Beginning in 2022, the Board began registration of all entities offering court reporting services in California, ensuring consumers are protected whether they obtain services from a licensee-owned firm or non-licensee-owned firm.

While litigants may hire individual court reporters directly to report their proceedings, more typically court reporting services are arranged through firms. Firms act much like temporary agencies where they receive the job information from the litigant and subcontract the reporting to individual court reporters. The licensee reports the proceedings, produces the transcript, and provides the transcript to the firm. The firm then distributes the transcript to any parties that ordered the transcript and bills accordingly.

In the past, the rates that freelance reporters (those not employed by courts) could charge were set by statute. In a 1981 compromise package with the profession, the Legislature eliminated the regulation of rates and created the Transcript Reimbursement Fund (TRF), a special fund fully funded by a portion of the court reporters' licensing fees to ensure that the deregulation of rates did not result in harm to indigent litigants who otherwise could not afford the services of freelance court reporters. The TRF allows indigent litigants in civil cases access to reporter transcripts by reimbursing reporters for transcripts through the Transcript Reimbursement Fund.



In 2011, the TRF was expanded to allow qualified pro per litigants, those representing themselves without benefit of counsel, to apply for reimbursement. It started out as a two-year pilot program, and in 2013 it was made a permanent part of the fund.

Under the TRF program, the Board has paid more than \$9.5 million on behalf of indigent litigants to licensed reporters. By law, the TRF may be funded up to \$300,000 as long as the Board maintains a minimum of six months' operating expenses.

In 2021, the Board received a one-time transfer of \$500,000 from the General Fund to the TRF. The TRF is otherwise funded solely from new application and renewal fees.

## **Description and Responsibilities**

The Board regulates the court reporting profession through testing, licensing, and disciplining court reporters, who use the title designation Certified Shorthand Reporter (CSR). By statute, the use of the acronym CSR is restricted to those individuals who have a Board-issued license. In California, a person must be licensed to work as a court reporter in state courts (official reporter) or to act as a deposition officer (freelance reporter). Freelance reporters provide services as individual contractors or subcontracted through court reporting firms. Codes governing deposition/freelance reporters can be found in the Code of Civil Procedure 2025, et al. As of July 1, 2023, there were 6562 licensed CSRs in California, of which 5584 licensees are active and in good standing. As of the same date, there are 213 registered firms.

The Board also has oversight for schools offering court reporting education. Although the Board "recognizes" schools, there is no statutory authority for licensure of the schools. However, only court reporting schools recognized by the Board can certify students to qualify to sit for the CSR license examination. There are eight schools of court reporting recognized by the Board – six public schools and two private schools (Attachment A). The Board can discipline schools up to and including removing recognition. The Board can also issue citations and can issue fines to schools not in compliance with Board rules.

### **1. Describe the make-up and functions of each of the board's committees (cf., Section 12, Attachment – Not Applicable).**

To conserve resources and funds, the Board currently has no active standing committees, but rather appoints task forces to work on specific issues as they arise. A specific example is the License Reciprocity Task Force, which was appointed in 2021 and finished its work in 2022. The Best Practice Pointers Task Force also met and developed additional pointers for publication, (Attachment C)

An organizational chart does not exist showing the relationship of committees to the Board and the membership of each committee because it doesn't apply to the Board's current structure. Table 1a. shows Board member participation in the various task forces.

The Board itself comprises five members, two of whom are licensed CSRs and three of whom are public members. The Governor appoints the two licensees and one of the public members. These three appointments require Senate confirmation. Of the two remaining public members, one is appointed by the Speaker of the Assembly, and the second is appointed by the Senate Rules Committee. All serve four-year terms. The members appointed by the Governor may serve up to a 60-day grace period at the end of their term. The members appointed by the Speaker of the

Assembly and the Senate Rules Committee have up to a one-year grace period at the end of their term. There is a maximum of two consecutive full terms for appointments. There are currently no vacancies.

<b>Table 1a. Attendance</b>	<b>Elizabeth Lasensky</b>	Date Appointed: 10/15/2007, 6/6/2011 & 3/9/2016	
<b>Meeting Type</b>	<b>Meeting Date</b>	<b>Meeting Location</b>	<b>Attended?</b>
Board Meeting	7/19/2018	Los Angeles	Yes
Board Meeting/Strategic Planning	9//2018	Sacramento	Yes
Board Meeting	2/4/2019	Sacramento	Yes
Board Meeting	7/12/2019	Ontario	Yes
Board Meeting	11/15/2019	Sacramento	Yes
Board Meeting	5/21/2020	Remote	Yes

<b>Table 1a. Attendance</b>	<b>Toni O'Neill</b>	Date Appointed: 8/7/2010, 8/4/2011, 7/3/2013 & 7/27/2017	
<b>Meeting Type</b>	<b>Meeting Date</b>	<b>Meeting Location</b>	<b>Attended?</b>
Board Meeting	7/19/2018	Los Angeles	Yes
Board Meeting/Strategic Planning	9/17/2018	Sacramento	Yes
Board Meeting	2/4/2019	Sacramento	Yes
Board Meeting	7/12/2019	Ontario	Yes
Board Meeting	11/15/2019	Sacramento	Yes
Board Meeting	5/21/2020	Remote	Yes
Task Force Meeting	6/19/2020	Remote	Yes
Task Force Meeting	6/26/2020	Remote	Yes
Board Meeting	11/20/2020	Remote	Yes
Task Force Meeting	3/29/2021	Remote	Yes
Board Meeting	4/16/2021	Remote	Yes
Task Force Meeting	7/14/2021	Remote	Yes
Board Meeting	8/20/2021	Remote	Yes

<b>Table 1a. Attendance</b>	<b>Davina Hurt</b>	Date Appointed: 2/26/2013, 7/9/2015 & 5/19/2020	
<b>Meeting Type</b>	<b>Meeting Date</b>	<b>Meeting Location</b>	<b>Attended?</b>
Board Meeting	7/19/2018	Los Angeles	Yes
Board Meeting/Strategic Planning	9/17/2018	Sacramento	Yes
Board Meeting	2/4/2019	Sacramento	Yes
Board Meeting	7/12/2019	Ontario	Yes
Board Meeting	11/15/2019	Sacramento	Yes
Board Meeting	5/21/2020	Remote	Yes
Task Force Meeting	6/19/2020	Remote	N/A
Task Force Meeting	6/26/2020	Remote	N/A
Board Meeting	11/20/2020	Remote	Yes
Task Force Meeting	3/29/2021	Remote	N/A
Board Meeting	4/16/2021	Remote	Yes
Task Force Meeting	7/14/2021	Remote	N/A
Board Meeting	8/20/2021	Remote	Yes
Board Meeting	1/26/2022	Remote	Yes
Board Meeting	7/15/2022	Sacramento & Remote	Yes
Task Force Meeting	9/30/2022	Remote	Yes
Board Meeting	12/14/2022	Remote	Yes
Board Meeting	3/28/2023	Remote	Yes

<b>Table 1a. Attendance</b>	<b>Rosalie Kramm</b>	Date Appointed: 7/3/2013 & 7/27/2017	
<b>Meeting Type</b>	<b>Meeting Date</b>	<b>Meeting Location</b>	<b>Attended?</b>
Board Meeting	7/19/2018	Los Angeles	No

<b>Table 1a. Attendance</b>	<b>Carrie Nocella</b>	Date Appointed: 6/17/2016	
<b>Meeting Type</b>	<b>Meeting Date</b>	<b>Meeting Location</b>	<b>Attended?</b>
Board Meeting	7/19/2018	Los Angeles	Yes
Board Meeting/Strategic Planning	9/17/2018	Sacramento	No
Board Meeting	2/4/2019	Sacramento	No
Board Meeting	7/12/2019	Ontario	Yes
Board Meeting	11/15/2019	Sacramento	No
Board Meeting	5/21/2020	Remote	Yes
Task Force Meeting	6/19/2020	Remote	N/A
Task Force Meeting	6/26/2020	Remote	N/A
Board Meeting	11/20/2020	Remote	Yes

<b>Table 1a. Attendance</b>	<b>Robin Sunkees</b>	Date Appointed: 11/20/2019 & 7/21/2021	
Board Meeting	5/21/2020	Remote	Yes
Task Force Meeting	6/19/2020	Remote	Yes
Task Force Meeting	6/26/2020	Remote	Yes
Board Meeting	11/20/2020	Remote	Yes
Task Force Meeting	3/29/2021	Remote	Yes
Board Meeting	4/16/2021	Remote	Yes
Task Force Meeting	7/14/2021	Remote	Yes
Board Meeting	8/20/2021	Remote	Yes
Board Meeting	1/26/2022	Remote	Yes
Board Meeting	7/15/2022	Sacramento & Remote	Yes
Task Force Meeting	9/30/2022	Remote	Yes
Board Meeting	12/14/2022	Remote	Yes
Board Meeting	3/28/2023	Remote	Yes

<b>Table 1a. Attendance</b>	<b>Denise Tugade</b>	Date Appointed: 5/5/2021	
<b>Meeting Type</b>	<b>Meeting Date</b>	<b>Meeting Location</b>	<b>Attended?</b>
Board Meeting	8/20/2021	Remote	Yes
Board Meeting	1/26/2022	Remote	Yes
Board Meeting	7/15/2022	Sacramento & Remote	Yes
Task Force Meeting	9/30/2022	Remote	N/A
Board Meeting	12/14/2022	Remote	Yes
Board Meeting	3/28/2023	Remote	Yes

<b>Table 1a. Attendance</b>	<b>Laura Brewer</b>	Date Appointed: 11/20/2021	
<b>Meeting Type</b>	<b>Meeting Date</b>	<b>Meeting Location</b>	<b>Attended?</b>
Board Meeting	1/26/2022	Remote	Yes
Board Meeting	7/15/2022	Sacramento & Remote	No
Task Force Meeting	9/30/2022	Remote	N/A
Board Meeting	12/14/2022	Remote	Yes
Board Meeting	3/28/2023	Remote	Yes

<b>Table 1a. Attendance</b>	<b>Arteen Mnayan</b>	Date Appointed:	6/14/2022 & 7/6/2023
<b>Meeting Type</b>	<b>Meeting Date</b>	<b>Meeting Location</b>	<b>Attended?</b>
Board Meeting	7/15/2022	Sacramento & Remote	Yes
Task Force Meeting	9/30/2022	Remote	N/A
Board Meeting	12/14/2022	Remote	Yes
Board Meeting	3/28/2023	Remote	Yes

<b>Table 1a. Attendance</b>	<b>Michael Dodge-Nam</b>	Date Appointed:	6/28/2023
<b>Meeting Type</b>	<b>Meeting Date</b>	<b>Meeting Location</b>	<b>Attended?</b>
<i>Appointed after last meeting of FY 2022/23</i>			

**Table 1b. Board/Committee Member Roster**

Member	First Appointed	Re-appointed	Term Expires	Appointing Authority	Appointment Type
<p><b>Elizabeth Lasensky</b> Ms. Lasensky has a BA in English and a Masters in Library Science. She worked for 20 years as an administrator at Stanford University. She is active with Yolo MoveOn, Yolano Climate Action, the University Farm Circle, a member of the Davis Odd Fellows Lodge, and serves on the board and Advocacy Committee for the Yolo County Healthy Aging Alliance.</p>	10/15/2007	6/6/2011; 3/9/2016	6/1/2019 [Grace Period Ended 6/1/2020]	Senate Rules Committee	Public
<p><b>Toni O'Neill</b> Ms. O'Neill is freelance reporter focusing on pro tem work for the courts. She previously worked in the positions of official reporter, senior reporter, and supervising reporter during her 27-year tenure with Riverside County Superior Court. Prior to that, she worked as freelance court reporter and as an owner/partner of a deposition agency. She is a member of the National Court Reporters Association and past president of the California Court Reporters Association and has served on various committees for both professional associations.</p>	8/7/2010	8/4/2011; 7/3/2013; 7/27/2017	6/1/2021	Governor	Professional
<p><b>Davina Hurt</b> Ms. Hurt is a two-term councilwoman and past mayor of the City of Belmont. She serves as the San Mateo County cities representative to Bay Area Air Quality Management District Board. She was appointed to the California Air Resources Board in 2020. She has practiced law in California since 2005 after earning her J.D. at Santa Clara University School of Law with a specialized certificate in International Public law. She studied at the University of Strasbourg's International Institute of Human Rights and has a BA in History and Political Science with a minor in Biology from Baylor University.</p>	2/26/2013	7/9/2015; 5/19/2020	6/1/2023	Speaker of the Assembly	Public

<p><b>Rosalie Kramm</b> Ms. Kramm is a Certified Realtime Reporter and Registered Professional Reporter from San Diego, California, and President of Kramm Court Reporting. She has been working as a freelance deposition reporter in Southern California since September 1981, and specializes in technical, complex business, and realtime court reporting. She has been active in numerous industry associations, including being president of the Deposition Reporters Association of California, president of the Society for the Technological Advancement of Reporting, and serving on various committees for the National Shorthand Reporters Association.</p>	7/3/2013	7/27/2017	6/1/2021 [Resigned 8/17/2018]	Governor	Professional
<p><b>Carrie Nocella</b> Ms. Nocella is the Director of External Affairs at the Disneyland Resort. She is active in the community and represents the resort on multiple association boards and committees. Prior to joining Disney, she was an attorney in Sacramento having obtained her Juris Doctorate from University of the Pacific- McGeorge School of Law. She has served as an adjunct law professor at Chapman University School of Law where she received her Bachelor of Arts in Legal Studies and a minor in Spanish. She served as an intern for the United States Supreme Court and Congresswoman Loretta Sanchez.</p>	6/17/2016	N/A	6/1/2020 [COVID Extension to 11/3/2020]	Governor	Public
<p><b>Robin Sunkees</b> Ms. Sunkees of Carlsbad is freelance reporter focusing on pro tem work for the court. She was an official court reporter for the San Diego County Superior Court from 1991 to 2022, and an official court reporter for the Maricopa County Superior Court from 1986 to 1991. She was a court reporter for M.L. Spicer Reporting from 1985 to 1986. Ms. Sunkees is a member of the San Diego Superior Court Reporters Association, California Court Reporters Association, and the National Court Reporters Association.</p>	11/20/2019	7/1/2021	6/1/2025	Governor	Professional

<p><b>Denise Tugade</b>  Ms. Tugade is a Government Relations Advocate for SEIU United Health Workers (UHW) West. She previously served as staff in the California State Assembly from 2017 to 2020, most recently as Legislative Director for California State Assemblymember Christy Smith (D-Santa Clarita). She was the Assembly Democrats Volunteer and Mail Tree Program Coordinator for the Christy Smith for State Assembly Campaign in 2018. Tugade was a Legislative Aide for Assemblymember Lorena Gonzalez (D-San Diego) and was Communications Director and a Legislative Assistant for then-California State Assemblymember Monique Limón. She was a Senior Associate, AGILE and Human Centered Designed Lead, and Social Media Manager at Cambria Solutions, Inc. from 2015 to 2017. Tugade was a District Coordinator for the Tubeho Neza (Live Well) program at DelAgua Health Ltd. Rwanda in 2014. She is a graduate of the California Asian Pacific Islander Staff Academy. She is the immediate past president of the Feminist Democrats (Fem Dems) of Sacramento, and serves on the executive boards of the Young Asian American Pacific Islander Sacramento Democrats, New Leaders Council Sacramento, and Barkada Sacramento.</p>	5/5/2021	N/A	6/1/2024	Governor	Public
<p><b>Laura Brewer</b>  Ms. Brewer, of Nevada City, has been a court reporter since 1981, working as a freelance deposition reporter and a conference reporter. She has worked as a Communication Access Realtime Translation (CART) captioner and as a realtime reporter since 1992. She is a member of the National Court Reporters Association (NCRA), the Deposition Reporters Association of California, and Intersteno. She has been recognized as a Fellow of the Academy of Professional Reporters (NCRA) and holds the highest levels of certification available. She has served on committees and in other volunteer roles for all three organizations and has successfully competed in steno competitions sponsored by each association.</p>	11/20/2021	N/A	6/1/2025	Governor	Professional

<p><b>Arteen Mnayan</b> Mr. Mnayan of Los Angeles is an attorney in the Land Use and Public Policy, Regulatory &amp; Political Law practice of Mayer Brown LLP's Los Angeles office. He primarily represents investors and developers in all aspects of the real estate entitlement and development process, focusing on land use entitlement matters, helping developers navigate state and local regulations and authorities, government outreach, and California Environmental Quality Act compliance. As an active member of the policy and land use community, he serves on the Los Angeles Business Council's Legislative Affairs Committee and the Valley Industry and Commerce Association's Land Use Committee and serves on the boards and committees of several non-profit organizations. During law school, he externed for the Central District of California Bankruptcy Court for the Honorable Victoria S. Kaufman. He earned his law degree from Loyola Law School, Los Angeles, and his undergraduate degree from the University of Southern California.</p>	6/14/2022	7/6/2023	6/1/2027	Senate Rules Committee	Public
<p><b>Michael Dodge-Nam</b> Mike Dodge-Nam of Los Angeles was appointed in 2023 to the Court reporters Board by the Speaker of the Assembly. Mr. Dodge-Nam currently serves as the Chief Business Officer of Roar Social. With over two decades of success, he has a track record of building and growing companies at the intersection of media and technology. Prior to Roar Social, he was Chief Operating Officer of Care Solace, where he focused on improving mental healthcare for school systems and their families. He has served in C-level roles at a wide variety of media and technology ventures and online publishing giants and has also held executive and management positions at Fortune 500 companies. He holds a BA in political science from the University of Chicago and an MBA from the Harvard Business School.</p>	6/28/2023		6/1/2027	Speaker of the Assembly	Public

**2. In the past four years, was the board unable to hold any meetings due to lack of quorum? If so, please describe. Why? When? How did it affect operations?**

The Board has not had to cancel a meeting for lack of a quorum in the period since the last sunset review.

**3. Describe any major changes to the board since the last Sunset Review, including, but not limited to:**

- **Internal changes (i.e., reorganization, relocation, change in leadership, strategic planning)**
- **All legislation sponsored by the board and affecting the board since the last sunset review.**
- **All regulation changes approved by the board since the last sunset review. Include the status of each regulatory change approved by the board.**

The Board has had a new chair since September of 2023, Ms. Denise Tugade, a public member appointed by the Governor in May of 2021. In November of 2019, the Governor appointed licensee Ms. Robin Sunkees and in November of 2021, appointed licensee member, Ms. Laura Brewer. The Senate Rules Committee appointed Mr. Arteen Mnayan in June of 2022. The Speaker of the Assembly appointed Mr. Michael Dodge-Nam in June of 2023.

Strategic planning is conducted every three to five years. The prior strategic plan for 2019-2023 was adopted February 4, 2019, and is included in this report as Attachment D. The Board conducted its latest strategic planning session on August 31, 2023. Board staff will work with SOLID, DCA's training agency and facilitator for the strategic planning session, on completing the report for the Board's review at its spring meeting.

There have been a number of legislative changes affecting the court reporting industry since the last sunset review. In 2018, AB 2084 (Kalra) was signed into law, requiring firms that offer court reporting services to follow all the laws and regulations that apply to individual court reporters. This was another step forward on regulating non-licensee-owned firms, an initiative the Board had been pursuing for nearly a decade.

In 2020, SBG 1146 (Umberg) was signed into law. This bill made permanent an emergency measure put into place by the COVID restrictions which allowed court reporters to report depositions without being in the presence of the witness.

Another milestone for the Board occurred in 2021 when SB 241 (Umberg) was signed into law. This bill was a comprehensive firm registration bill. This was a huge benefit for consumers, who now are protected when they hire a registered firm, whether or not it is owned by a licensee.

Also in 2021, adjustments were made to the Pro Per portion of the Transcript Reimbursement Bill with the passage of the 2021 Budget Act. The cap per case was changed from \$1500 to \$2500, and the \$75,000 per year cap on the overall Pro Per Program was removed.

The Budget Act of 2021 also included \$30 million in funding for courts to hire and retain court reporters in family and civil law courtrooms. After an initial delay for clarification, many courts are using that funding to offer a variety of hiring and retention incentives.

The Budget Act of 2021 made small but important clarifying amendments to the firm registration statutes, making it clear the law applied to all entities offering court reporting services no matter how the business was formed.

The Board is grateful for the passage of SB 1443 (Roth), which extended the Board's sunset date one year. This bill was signed into law in September of 2022.

Another milestone for the Board was as a result of the Budget Act of 2022. This legislation included the authority for the Board to license voice writers, an alternate form of verbatim reporting. This initiative was something the Board had been working on for five years.

Also included in the Budget Act of 2022 was an expansion of title protection. Prior to the passage of the legislation, only people who had passed the California license exam could use the terms "certified shorthand reporter" or "CSR." That list of terms was expanded to prohibit the use of "stenographer," "reporter," "court reporter," "deposition reporter," or "digital reporter," by non-licensees.



In 2019 regulations were approved to increase the Board's initial license and renewal fee to \$225.00. The current statutory limit is \$250.00. This increase was to solve a fiscal imbalance which did not allow the administration of the TRF.

In 2021 regulations were approved to implement AB 2138, which requires boards to amend their existing regulations governing substantially related crimes or acts as well as rehabilitation criteria.

And finally, in 2022, regulations were approved to set the fee for firm registration at \$500 annually.

#### **4. Describe any major studies conducted by the board (cf. Section 12, Attachment E).**

In 2020, the Board entered into an interagency agreement with the Office of Professional Examination Services (OPES) to have them evaluate the National Court Reporters Association's (NCRA) Registered Professional Reporter (RPR) certification as well as the state license exam of Texas. This review was to further the Board's efforts at exploring license reciprocity. The Texas exam was found to lack an occupational analysis, and the RPR was found to have an inadequate occupational analysis.

In 2022, the Board entered into a similar agreement with OPES to evaluate the National Verbatim Reporters Association's (NVRA) Certified Verbatim Reporter (CVR) certificate. This test is equivalent in speed to the RPR but is specific to voice writers. Work is currently underway on that evaluation. The NVRA also tests steno reporters at the same speed and accuracy, and that certification is known as the CVR-S.

In 2021, the Board conducted an occupational analysis, facilitated by OPES, to ensure that it is testing candidates on the skills and knowledge that are currently needed to enter the court reporting profession. The purpose was to define the profession in terms of actual job tasks that new licensees must be able to perform safely and competently at the time of licensure and in terms of the knowledge necessary to perform those tasks. The results of the occupational analysis provide the basis for the license examinations. The validation report is attached as Attachment E.

#### **5. List the status of all national associations to which the board belongs.**

- **Does the board's membership include voting privileges?**
- **List committees, workshops, working groups, task forces, etc., on which the board participates.**
- **How many meetings did board representative(s) attend? When and where?**
- **If the board is using a national exam, how is the board involved in its development, scoring, analysis, and administration?**

The Board does not belong to any national associations.

## Section 2 – Fiscal and Staff

### Fiscal Issues

**6. Is the board’s fund continuously appropriated? If yes, please cite the statute outlining this continuous appropriation.**

The CRB is not continuously appropriated. It is set as an appropriation in the Governor’s budget.

**7. Describe the board’s current reserve level, spending, and if a statutory reserve level exists.**

Per our fund condition report prepared in August 2023, the Board is operating the current fiscal year of 2023-24 with months in reserve of 10.6. While the Board has been enjoying the benefits of cost-savings from remote meetings and testing, the Board maintains a close eye on the future years’ months in reserve to ensure it will not drop below the six-month operating reserves requirement for funding the TRF.

**8. Describe if/when a deficit is projected to occur and if/when a fee increase or reduction is anticipated. Describe the fee changes (increases or decreases) anticipated by the board.**

The Board is not projected to approach the six months’ threshold until FY 26/27. It is likely the Board will need to increase fees to the statutory cap of \$250 annually. Work on the regulations package to effectuate that change would likely begin in 2024.

<b>Table 2. Fund Condition</b>							
(Dollars in Thousands)	FY 2018/19	FY 2019/20	FY 2020/21	FY 2021/22	FY 2022/23 <sup>4</sup>	FY 2023/24 <sup>5</sup>	FY 2024/25 <sup>5</sup>
Beginning Balance <sup>1</sup>	\$435	\$349	\$606	\$818	\$1,068	\$1,225	\$1,212
Total Revenue	\$1,073	\$1,447	\$1,391	\$1,362	\$1,401	\$1,326	\$1,327
Revenue Transfer to Transcript Reimbursement Fund	\$0	\$0	-\$200	\$0	\$0	\$0	-\$100
Transfers to General Fund <sup>2</sup>	\$0	\$0	\$0	-\$39	\$0	\$0	\$0
Loans to General Fund	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Loans Repaid From General Fund	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Accrued Interest, Loans to General Fund	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Total Revenues and Transfers	\$1,073	\$1,447	\$1,191	\$1,323	\$1,401	\$1,326	\$1,227
Budget Authority	\$1,129	\$1,160	\$1,152	\$1,224	\$1,242	\$1,244	\$1,281
Expenditures <sup>3</sup>	\$1,143	\$1,185	\$1,027	\$1,073	\$1,244	\$1,339	\$1,376
Fund Balance	\$365	\$611	\$770	\$1,068	\$1,225	\$1,212	\$1,063
Months in Reserve	3.7	7.1	8.6	10.3	11.0	10.6	9.2

<sup>1</sup> Actuals include prior year adjustments

<sup>2</sup> Includes EO transfer to GF (AB 84)

<sup>3</sup> Expenditures include reimbursements and direct draws to the fund

<sup>4</sup> Estimate, based on FM 12

<sup>5</sup> Estimate, based on 2023 Budget Act

**9. Describe the history of general fund loans. When were the loans made? When have payments been made to the board? Has interest been paid? What is the remaining balance?**

There are no outstanding loans at this time.

**10. Describe the amounts and percentages of expenditures by program component. Use Table 3. Expenditures by Program Component to provide a breakdown of the expenditures by the board in each program area. Expenditures by each component (except for pro rata) should be broken out by personnel expenditures and other expenditures.**

A review of the data in Table 3 demonstrates that enforcement costs have increased only slightly since the last sunset review. A significant portion of the enforcement expenses is the Attorney General line item. Matters that are referred to the Attorney General’s Office are more serious matters and, therefore, are more costly to resolve. There really is no predicting what type of complaints will be received nor how complicated they will be, which makes forecasting costs virtually impossible, and, therefore, the Board relies on historical data to project costs.

Examination expenses went down significantly in FY 2021-22 as the skills portion of the exam was completely online for that year. Expenses increased in FY 22-23 due to the cost of conducting the updated occupational analysis.

The licensing expenditures remain relatively stable with a slight downward trend reflecting the slight downward trend of the number of licensees.

The Board continues to be very conscious of keeping administrative costs as low as possible, and the data in Table 3 reflect those efforts.

<b>Table 3. Expenditures by Program Component</b>										
(Dollars in Thousands)	FY 2018/19		FY 2019/20		FY 2020/21		FY 2021/22		FY 2022/23**	
	Personnel Services	OE&E	Personnel Services	OE&E	Personnel Services	OE&E	Personnel Services	OE&E	Personnel Services	OE&E
Enforcement	\$150	\$86	\$150	\$108	\$129	\$79	\$140	\$71	\$161	\$62
Examination	\$120	\$103	\$120	\$133	\$103	\$127	\$112	\$78	\$129	\$186
Licensing	\$120	\$29	\$120	\$30	\$103	\$16	\$112	\$26	\$129	\$18
Administration *	\$250	\$40	\$254	\$38	\$227	\$21	\$251	\$32	\$281	\$23
DCA Pro Rata	\$0	\$152	\$0	\$144	\$0	\$142	\$0	\$155	\$0	\$155
Diversion (if applicable)	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
<b>TOTALS</b>	<b>\$640</b>	<b>\$410</b>	<b>\$644</b>	<b>\$453</b>	<b>\$562</b>	<b>\$385</b>	<b>\$615</b>	<b>\$362</b>	<b>\$700</b>	<b>\$444</b>

\* Administration includes costs for executive staff, board, administrative support, and fiscal services.

\*\* Projections based on FM 12

**11. Describe the amount the board has contributed to the BreZE program.**

The total contribution by the Board to BreZE is \$212,669. The last year of a contribution was FY 2017/18.

**12. Describe license renewal cycles and history of fee changes in the last 10 years. Give the fee authority (Business and Professions Code and California Code of Regulations citation) for each fee charged by the board.**

Licenses are renewed annually, due on the last day of the licensee’s birth month.

In 1981, the profession initiated legislation that created the Transcript Reimbursement Fund (TRF) to fund payment of court transcripts for indigent litigants in civil matters. By law, the Board funds the TRF in \$100,000 increments, up to a maximum of \$300,000 per year. The Board must stop transfers to the TRF when the Board’s reserve of operating expenses falls below six months. To create this fund, licensing fees were increased from \$40 every two years to \$125 the first year, and \$60 the second year. Subsequently, annual renewal fees were increased to \$80 and then to \$100, in effect since before 1997. Beginning July 1, 2010, the renewal fee increased to \$125, the statutory limit at that time. Effective January 1, 2017, the statutory limit was raised to \$250.

The authority for the fees charged by the Board are found in Business & Professions Code sections 163.5, 8004, 8008, 8031, and section 2450 of Division 24 of Title 16 of the California Code of Regulations.

<b>Table 4. Fee Schedule and Revenue</b> (dollars in thousands)								
Fee	Current Fee Amount	Statutory Limit	FY 2018/19 Revenue	FY 2019/20 Revenue	FY 2020/21 Revenue	FY 2021/22 Revenue	FY 2022/23 Revenue	% of Total Revenue
Delinquent Renewal - CSR	\$112.50	\$125	\$16	\$22	\$20	\$24	\$25	2%
Cite and Fine	Various	Various	\$19	\$13	\$10	\$13	\$4	1%
Duplicate Cert	\$5	\$10	\$0	\$0	\$0	\$0	\$0	0%
Initial License 1/2 - CSR	\$112.50	\$125	\$1	\$2	\$1	\$1	\$2	0%
Initial License - CSR	\$225.00	\$250	\$3	\$10	\$6	\$5	\$11	1%
Re-Exam Dictation	\$25	\$75	\$9	\$6	\$6	\$6	\$8	1%
Re-Exam English	\$25	\$75	\$3	\$3	\$3	\$3	\$5	0%
Re-Exam Prof Practice	\$25	\$75	\$2	\$2	\$3	\$3	\$4	0%
Application Fee - CSR	\$40	\$40	\$3	\$3	\$3	\$4	\$6	0%
Initial Ann Reg CRF	\$500	\$500	\$0	\$0	\$0	\$0	\$48	1%
Renewal Fee - CSR	\$225	\$250	\$928	\$1,371	\$1,331	\$1,298	\$1,267	93%
Surplus Money Investments	Various	Various	\$9	\$14	\$5	\$4	\$21	1%
Canceled Warrants	\$25	\$25	\$0	\$0	\$1	\$1	\$0	0%
Dishonored Check Fee	\$25	\$25	\$0	\$0	\$0	\$0	\$0	0%
Misc Revenue	Various	Various	\$80	\$1	\$2	\$0	\$0	1%
<b>Total</b>			<b>\$1,073</b>	<b>\$1,447</b>	<b>\$1,391</b>	<b>\$1,362</b>	<b>\$1,401</b>	<b>100%</b>

**13. Describe Budget Change Proposals (BCPs) submitted by the board in the past four fiscal years.**

The Board has submitted no Budget Change Proposals in the interim period from the last sunset review period.

<b>Table 5. Budget Change Proposals (BCPs)</b>								
BCP ID #	Fiscal Year	Description of Purpose of BCP	Personnel Services				OE&E	
			# Staff Requested (include classification)	# Staff Approved (include classification)	\$ Requested	\$ Approved	\$ Requested	\$ Approved
<i>Not Applicable</i>								

**Transcript Reimbursement Fund**

There are two programs under the Transcript Reimbursement Fund (TRF) (B&P Code sections 8030.1. through 8030.10). The first program, known as the Pro Bono Program, was established by the Legislature in 1981 and is available to pro bono attorneys representing indigent litigants. The second program, known as the Pro Per Program, was an expansion of the TRF in 2011 to qualified indigent pro per litigants. Both programs assist indigent litigants in civil matters; however, they differ in who may apply and how much monetary assistance is available to individual cases and all cases overall. The TRF is funded by annual license renewal fees and since its inception has reimbursed transcription costs totaling more than \$9.5 million.

Essentially, the criteria to qualify for reimbursement are:

- The applicant must be either an indigent pro per litigant or a qualified legal services project, qualified support center or other qualified project representing an indigent litigant.
- The case cannot be fee-generating.
- The applicant must certify to refund the full amount of all reimbursements from the TRF from any award of court costs or attorney fees.
- The TRF provides reimbursement for costs as outlined in B&P Code 8030.6.

<b>Transcript Reimbursement Fund (Pro Bono)</b>					
	FY 2018/19	FY 2019/20	FY 2020/21	FY 2021/22	FY 2022/23
No. of Requests for Reimbursement Received	4	30	164	124	94
No. of Requests Approved	0	0	156	117	84
No. of Requests Denied	4*	30*	8	7	10
Amount of Funds Disbursed	\$0	\$0	\$96,421	\$61,317	\$120,816
Amount of Funds Recovered by Judicial Award of Costs	\$8,331	\$3,737	\$21,475	\$666	\$5,742

<b>Transcript Reimbursement Fund (Pro Per)</b>					
	FY 2018/19	FY 2019/20	FY 2020/21	FY 2021/22	FY 2022/23
No. of Requests for Reimbursement Received	38	25	119	310	277
No. of Requests Approved	24	0	77	211	263
No. of Requests Denied	38*	25*	22*	9	12
Amount of Funds Allocations (Provisional Approval)	\$0	\$0	\$2,652	\$10,466	\$28,574
Amount of Funds Disbursed	\$10,139	\$846	\$8,043	\$33,678	\$57,409
Amount of Funds Recovered by Judicial Award of Costs	\$0	\$0	\$0	\$0	\$0

\* Includes applications returned during temporary closure.

Transfers are made from the Court Reporters Board Fund to the TRF in increments of \$100,000 up to \$300,000 per year. The Board must stop transfers to the TRF when the Board's reserve of operating expenses falls below six months. This threshold was reached in FY 2016-17, and the TRF was temporarily closed in April of 2018. The Board took restorative measures to increase its revenue, resulting in a budget reserve healthy enough to reopen the TRF on November 2, 2020. Part of these measures included an increase in licensing fees from \$125 to \$225 annually effective January 1, 2019.

In 2021, the Board received a one-time transfer of \$500,000 from the General Fund to the TRF. The TRF is otherwise funded solely from new application and renewal fees.

## **Staffing Issues**

### **14. Describe any board staffing issues/challenges, i.e., vacancy rates, efforts to reclassify positions, staff turnover, recruitment and retention efforts, succession planning.**

During the pandemic, the Board lost its half-time TRF Pro Per Staff Services Analyst. Existing TRF staff took on the additional work, which slowed application processing time. In July of 2023, the half-time office technician position was increased to full-time with TRF training underway, and the backlog is being reduced.

### **15. Describe the board's staff development efforts and total spent annually on staff development (cf., Section 12, Attachment B).**

While recognizing the importance of training and staff development, with such a small staff, having a single staff person out of the office has a significant impact on the provision of services. All of the courses taken have been offered through the DCA at no cost.

Attached as Attachment B are the year-end organizational charts for the Board.

## Section 3 – Licensing Program

**16. What are the board’s performance targets/expectations for its licensing<sup>1</sup> program? Is the board meeting those expectations? If not, what is the board doing to improve performance?**

The primary objective of licensing court reporters is to ensure that consumers receive accurate, timely, competent service from court reporters who, through examination, have demonstrated at least a minimum level of competency at the time of the examination. The Board expects license and examination applications to be processed promptly in order to facilitate the entry of as many competent court reporters as possible into the workforce as quickly as possible. Similarly, license renewals are to be processed as promptly as possible because court reporters may not work while their license fee is unpaid. The Board continues to meet these expectations by processing all applications and renewals within two to five business days. License renewals are due on the last day of the licensee’s birth month, so staff is very mindful of the time-sensitive nature of payments coming in at the end of the month and works with licensees via phone and e-mail to verify receipt of renewals.

**17. Describe any increase or decrease in the board’s average time to process applications, administer exams and/or issue licenses. Have pending applications grown at a rate that exceeds completed applications? If so, what has been done by the board to address them? What are the performance barriers and what improvement plans are in place? What has the board done and what is the board going to do to address any performance issues, i.e., process efficiencies, regulations, BCP, legislation?**

There has been no increase or decrease in the average time required to process applications or issue licenses. The Board does not have pending applications because they are processed promptly, typically within two to five business days. The Board sees no performance issues with its licensing program.

**18. How many licenses or registrations has the board denied over the past four years based on criminal history that is determined to be substantially related to the qualifications, functions, or duties of the profession, pursuant to BPC § 480? Please provide a breakdown of each instance of denial and the acts the board determined were substantially related.**

There have been no denials for license or registration based on criminal history since the last sunset review.

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<sup>1</sup> The term “license” in this document includes a license certificate or registration.

**Table 6a. Licensee Population**

		FY 2018/19	FY 2019/20	FY 2020/21	FY 2021/22	FY 2022/23
CSR	Active <sup>2</sup>	5686	5441	5169	4937	4752
	Out of State	640	634	675	755	821
	Out of Country	12	10	10	11	11
	Delinquent/Expired	1167	1156	1142	1097	970
	Retired Status <i>if applicable</i>	-	-	-	-	-
	Inactive	-	-	-	-	-
	Other <sup>3</sup>	-	-	-	-	-

Note: 'Out of State' and 'Out of Country' are two mutually exclusive categories. A licensee should not be counted in both.

**Table 6b. Licensee Population**

		FY 2018/19	FY 2019/20	FY 2020/21	FY 2021/22	FY 2022/23
CRF	Active <sup>4</sup>	-	-	-	-	187
	Out of State	-	-	-	-	26
	Out of Country	-	-	-	-	-
	Delinquent/Expired	-	-	-	-	-
	Retired Status <i>if applicable</i>	-	-	-	-	-
	Inactive	-	-	-	-	-
	Other <sup>5</sup>	-	-	-	-	-

Note: 'Out of State' and 'Out of Country' are two mutually exclusive categories. A licensee should not be counted in both.

<sup>2</sup> Active status is defined as able to practice. This includes licensees that are renewed, current, and active.

<sup>3</sup> Other is defined as a status type that does not allow practice in California, other than retired or inactive.

<sup>4</sup> Active status is defined as able to practice. This includes licensees that are renewed, current, and active.

<sup>5</sup> Other is defined as a status type that does not allow practice in California, other than retired or inactive.



**Table 7a. Licensing Data by Type**

	Application Type	Received	Approved/ Issued	Closed	Pending Applications			Cycle Times		
					Total (Close of FY)	Complete (within Board control)*	Incomplete (outside Board control)*	Complete Apps	Incomplete Apps	Combined, IF unable to separate out
FY 2018/19	(Exam)	54	54	0	-	-	-	-	-	-
	(License)	32	32	0	-	-	-	-	-	-
	(Renewal)	6306	6306	-	-	-	-	-	-	-
FY 2019/20	(Exam)	60	60	0	-	-	-	-	-	-
	(License)	66	66	0	-	-	-	-	-	-
	(Renewal)	6019	6019	-	-	-	-	-	-	-
FY 2020/21	(Exam)	55	55	0	-	-	-	-	-	-
	(License)	39	39	0	-	-	-	-	-	-
	(Renewal)	5815	5815	-	-	-	-	-	-	-
FY 2021/22	(Exam)	77	77	0	-	-	-	-	-	-
	(License)	35	35	0	-	-	-	-	-	-
	(Renewal)	5668	5668	-	-	-	-	-	-	-
FY 2022/23	(Exam)	107	107	0	-	-	-	-	-	-
	(License)	68	68	0	-	-	-	-	-	-
	(Renewal)	5516	5516	-	-	-	-	-	-	-

\* Optional. List if tracked by the board.

**Table 7b. License Denial**

	FY 2018/19	FY 2019/20	FY 2020/21	FY 2021/22	FY 2022/23	
	CSR	CSR	CSR	CSR	CSR	CRF
License Applications Denied (no hearing requested)	0	0	0	0	0	0
SOIs Filed	2	3	1	0	0	0
Average Days to File SOI (from request for hearing to SOI filed)	209	78	49	0	0	0
SOIs Declined	0	0	0	0	0	0
SOIs Withdrawn	0	0	1	0	0	0
SOIs Dismissed (license granted)	0	0	0	0	0	0
License Issued with Probation / Probationary License Issued	1	1	0	0	0	0
Average Days to Complete (from SOI filing to outcome)	120	182	0	0	0	0

### 19. How does the board verify information provided by the applicant?

The clear majority of applicants qualify to take the CSR examination by completing a training program through a recognized California court reporting school. If qualifying through a court reporting school program, the applicant must also have passed one speed examination known as a qualifier.

A person applying for the first time must complete an Application for Examination (Form PDE-22-281), which is included as Attachment H, and submit it to the Board, together with the required qualifying documents and the fee indicated on the face of the application. Persons applying for reexamination do not need to requalify but must complete and submit an Application for Reexamination (Form PDE-29-281), which is included as Attachment I, together with the fee indicated on the face of the application. At the time of testing for each portion of the exam, an applicant is required to provide a current government-issued form of identification which includes a photograph.

A variety of basic information is required to be submitted by examination applicants as indicated on the application form, including the nature and length of any work experience that can be used to establish the minimum one year (1,400 hours) of qualifying work experience. Level and location of educational background is also requested, as is information regarding court reporting certificates from other organizations or states as well as any criminal convictions. Supporting documentation via copies of certificates is required, and work experience must be verified on the official letterhead of the employer. All qualifying documentation is checked via phone or electronically, i.e., through licensing agencies in other states.

**a. What process does the board use to check prior criminal history information, prior disciplinary actions, or other unlawful acts of the applicant? Has the board denied any licenses over the last four years based on the applicant's failure to disclose information on the application, including failure to self-disclose criminal history? If so, how many times and for what types of crimes (please be specific)?**

The Board uses fingerprints to check the Department of Justice database for prior criminal history. If applicants are or have been licensed in another state, history of disciplinary actions is checked by contacting the licensing agency of that state.

The Board has denied six license applications since the last sunset review. Specifically, three applicants failed to disclose criminal convictions (misdemeanor theft; fraudulent check under \$500; and DUI) on their applications. All three applicants received their licenses with two years' probation.

Additionally, one applicant (two separate attempts to obtain licensure) was denied for failure to disclose criminal convictions (felony grand theft and misdemeanor petty theft); failure to disclose previous licensure in CA; and failure to disclose previous discipline in this and two other states. Ultimately, the applicant received their license with a public reprobation.

The last applicant failed to disclose a previous discipline in another state. The statement of issues was withdrawn by the Board, and the license was granted.

**b. Does the board fingerprint all applicants?**

All applicants for licensure must pass the CSR examination, and the Board has required fingerprints of all examination applicants since 1998.

**c. Have all current licensees been fingerprinted? If not, explain.**

Only those submitting applications for examination since 1998 have been fingerprinted. Anyone applying for the examination prior to 1998 has not been fingerprinted.

**d. Is there a national databank relating to disciplinary actions? Does the board check the national databank prior to issuing a license? Renewing a license?**

There is no national data bank for court reporters.

**e. Does the board require primary source documentation?**

The Board does require primary source documentation. For example, letters of recommendation are not acceptable as attesting to an applicant's work experience unless they are on official

letterhead. Otherwise, applicants must submit copies of actual job sheets to demonstrate experience.

**20. Describe the board's legal requirement and process for out-of-state and out-of-country applicants to obtain licensure.**

There are no differences in the requirements for out-of-state and out-of-country applicants. All applicants must complete the same requirements in order to obtain licensure. The Board is aware of and is compliant with the state and federal military portability laws and regulations.

**21. Describe the board's process, if any, for considering military education, training, and experience for purposes of licensing or credentialing requirements, including college credit equivalency.**

The Board considers court reporting experience with the military as an acceptable form of work experience for the license application.

**a. Does the board identify or track applicants who are veterans? If not, when does the board expect to be compliant with BPC § 114.5?**

The Board does track applicants who are veterans.

**b. How many applicants offered military education, training or experience towards meeting licensing or credentialing requirements, and how many applicants had such education, training or experience accepted by the board?**

There have been no applicants offering military education, training, or experience for meeting licensing credentialing requirements.

**c. What regulatory changes has the board made to bring it into conformance with BPC § 35?**

The Board has made no regulatory changes to conform with BPC section 35 because the Board already accepts military experience to qualify for licensure.

**d. How many licensees has the board waived fees or requirements for pursuant to BPC § 114.3, and what has the impact been on board revenues?**

The Board has waived fees for one licensee on active military duty. This has had a negligible impact on the Board's revenues.

**e. How many applications has the board expedited pursuant to BPC § 115.5?**

The skills or practical portion of the license examination cannot be expedited because of the nature of the examination itself. The two written portions of the license examination are available at any time so there is no reason for expedition.

**22. Does the board send No Longer Interested notifications to DOJ on a regular and ongoing basis? Is this done electronically? Is there a backlog? If so, describe the extent and efforts to address the backlog.**

The Board does this electronically on DOJ's website, and there is no backlog.

## Examinations

Table 8. Examination Data <sup>6</sup>				
California Examination (include multiple language) if any:				
	License Type: CSR	Exam Title		
		Dictation/Skills	English	Professional Practice
FY 2018/19	Number of 1 <sup>st</sup> Time Candidates	46	50	48
	Pass %	19.6%	62.0%	64.6%
	Fail %	80.4%	38.0%	35.4%
	Number of Overall Candidates	329	102	76
	Overall Pass %	5.5%	50.0%	63.2%
	Overall Fail %	94.5%	50.0%	36.8%
FY 2019/20	Number of 1 <sup>st</sup> Time Candidates	56	42	44
	Pass %	66.1%	61.9%	63.6%
	Fail %	33.9%	38.1%	36.4%
	Number of Overall Candidates	288	88	71
	Overall Pass %	27.1%	47.7%	63.4%
	Overall Fail %	72.9%	52.3%	36.6%
FY 2020/21	Number of 1 <sup>st</sup> Time Candidates	58	70	66
	Pass %	55.2%	77.1%	68.2%
	Fail %	44.8%	22.9%	31.8%
	Number of Overall Candidates	214	107	98
	Overall Pass %	21.5%	63.6%	64.3%
	Overall Fail %	78.5%	36.4%	35.7%
FY 2021/22	Number of 1 <sup>st</sup> Time Candidates	43	51	51
	Pass %	55.8%	66.7%	70.6%
	Fail %	44.2%	33.3%	29.4%
	Number of Overall Candidates	177	89	85
	Overall Pass %	20.9	55.1%	64.7%
	Overall Fail %	79.1	44.9%	35.3%
FY 2022/23	Number of 1 <sup>st</sup> Time Candidates	84	94	97
	Pass %	57.1%	76.6%	80.4%
	Fail %	42.9%	23.4%	19.6%
	Number of Overall Candidates	244	160	142
	Overall Pass %	26.2%	63.1%	69.7%
	Overall Fail %	73.8%	36.9%	30.3%
Date of Last OA			2023	2023
Name of OA Developer			OPES	OPES
Most Recent OA Date: July 2023				
<b>National Examination (include multiple language) if any: <i>Not Applicable</i></b>				

<sup>6</sup> This table includes all exams for all license types as well as the pass/fail rate. Include as many examination types as necessary to cover all exams for all license types.

**23. Describe the examinations required for licensure. Is a national examination used? Is a California specific examination required? Are examinations offered in a language other than English?**

California has one license category for court reporters, Certified Shorthand Reporter (CSR), and it is a required California-specific examination. However, there are two methods of reporting: stenotype machine and voice writing. The same license exam is given to both types, and the same license is issued with a notification of which certification they have used to pass the exam.

The primary objective of licensing court reporters is to ensure that consumers receive accurate, timely, and competent service from court reporters who, through examination, have demonstrated a minimum level of competency.

All persons desiring to practice as a CSR in the state of California (Section 8017, Business and Professions Code) must possess a valid license issued by the Court Reporters Board. Licensure is attained by passing all parts of a three-part examination (CCR Title 16, section 2420): two written portions and one practical or skills portion. The first written portion is Professional Practice, a 100-item multiple choice examination which tests knowledge of medical and legal terminology, ethics, and code requirements. The second written portion is English, which is another 100-item multiple choice examination which tests minimum competency in grammar, spelling, and punctuation. Both written portions are administered via a computer-based testing vendor.

The practical examination (dictation/transcription portion) consists of a 15-minute exercise. The test is now offered online through a third-party vendor using live proctors for security. Via pre-recorded video, four readers replicate a courtroom or deposition situation and dictate from an actual court or deposition proceeding. They read at an average speed of 200 words per minute while examinees report the dictation on a shorthand machine or using voice writing equipment. The examinees are given two hours to transcribe the last ten minutes of their notes. They are graded on the transcription submitted. Successful candidates must achieve 97.5% accuracy.

Applicants must qualify to sit for the examination through one of three methods:

- A. One year of experience (a minimum of 1,400 hours) in making verbatim records of depositions, arbitrations, hearings, or judicial or related proceedings by means of written symbols or abbreviations in shorthand or machine shorthand writing and transcribing these records.
- B. A verified certificate of satisfactory completion of a prescribed course of study in a recognized court reporting school or a certificate from the school that evidences an equivalent proficiency and the ability to make a verbatim record of material dictated in accordance with regulations adopted by the Board contained in Title 16 of the California Code of Regulations.
- C. An RPR certificate from the National Court Reporters Association or CVR or CVR-S certificate from the National Verbatim Reporters Association demonstrating proficiency in machine shorthand reporting.

Applicants have three years to pass all three parts of the examination before they are required to take the entire examination again. They may take or retake the failed portions up to three times per year. During the three-year period, they are required to take only the previously failed portions of the examination. The executive officer has the delegated authority to extend the three-year pass requirement for up to one additional year for good cause.

Examinees who have passed all parts of the examination are eligible for licensure. Actual licensure is attained by submitting the statutorily-required fee and the forms provided by the Board.

The license exam is offered three times a year. A candidate may take each portion of the exam once per cycle.

The two written portions of the examination are developed in conjunction with DCA's Office of Professional Examination Services (OPES). Development of the English and Professional Practice portions of the CSR examination begins with an occupational analysis to identify current job knowledge and skills necessary for entry-level court reporters. Upon validation of the occupational analysis, an examination plan is developed to not only identify knowledge and skills required, but also to weight them based on how important and/or how frequently the knowledge or skill is required.

Upon completion of the examination plan, four types of examination development workshops are held. Groups of subject matter experts (SMEs) made up of working court reporters, facilitated by OPES, write questions for the two written exams, each question being tied to the current examination plan. A subsequent group of SMEs reviews the questions, adding finished questions to the test bank. A third group of SMEs constructs the actual examination by selecting questions from the bank, weighted in a manner reflective of the examination plan. Finally, a fourth group of SMEs sets the passing score for a particular examination in accordance with the California Code of Regulations, Title 16, Division 24, Article 3, section 2420, which outlines the Board regulation that requires the passing grades for the written examinations be determined by the Angoff criterion-referenced method.

There are two nationally based, entry-level court reporter competency examinations. One is the Registered Professional Reporter (RPR) examination administered by the National Court Reporters Association (NCRA). The other is the Certified Verbatim Reporter (CVR and CVR-S) examination administered by the National Verbatim Reporters Association (NVRA). Holders of the RPR, the CVR, or CVR-S certification may apply to take the California CSR examination, but there is no straight reciprocity as there are significant differences between the two examinations in the areas of examination development, construction, and administration.

The exam is offered only in English as all proceedings are reported in English and the resultant transcript must be in English.

**24. What are pass rates for first time vs. retakes in the past 4 fiscal years? (Refer to Table 8: Examination Data) Are pass rates collected for examinations offered in a language other than English?**

Table 8 shows pass rates for each of the three examination sections for the first-time candidates as well as the overall pass rates. For the skills portion of the exam, the average pass rate over the last four years overall is 23.93; for first-timers, it is 58.55. For the English portion of the exam, the average pass rate overall is 57.38; for first-timers, it is 70.58. For the professional practice portion of the exam, the average pass rate overall is 65.53; for first-timers, it is 70.70.

The Board uses the first-time pass rate to evaluate an exam. There is no requirement for unsuccessful candidates to return to school, and the Board has no way of knowing how much, if at all, any of these repeaters practice.

The CSR exam is only offered in English as all reporting and transcription is done in English only.

**25. Is the board using computer based testing? If so, for which tests? Describe how it works. Where is it available? How often are tests administered?**

As of July 1, 2008, the Board has used computer-based testing for the two written portions of the license examination: English and Professional Practice. Once an applicant's qualifications are verified, staff forwards the candidate's information to the testing vendor, currently PSI, who in turn furnishes the candidate with all the information necessary to schedule and take the written portions of the examination. Results are returned to Board staff, who contacts the candidate with licensure or re-testing information. PSI has testing sites not only across California, but also across the United States.

Written exams are updated three times a year. Candidates may only take an examination once during the posting period, scheduled at their convenience.

Beginning in July of 2020, the Board moved to an online platform for the skills exam. The exam is available for three weeks during each of the three testing cycles. The exam is administered through a third-party vendor, Realtime Coach, which uses live proctors for security for the testing. The Board partnered with DCA's Office of Public Affairs to record a series of tests. The tests are developed from actual court and deposition transcripts and rigorously counted out for words and syllabic density. Candidates may choose the time best for them but must schedule 72 hours in advance in order for a proctor to be assigned. If they fail to pass the exam, the test they were assigned will no longer be available to them when they retest during the next testing cycle. Candidates may only test one time per exam cycle.

**26. Are there existing statutes that hinder the efficient and effective processing of applications and/or examinations? If so, please describe.**

The Court Reporters Board is experiencing no issues affecting the processing of applications or administration of examinations.

**27. When did the Board last conduct an occupational analysis that validated the requirement for a California-specific examination? When does the Board plan to revisit this issue? Has the Board identified any reason to update, revise, or eliminate its current California-specific examination?**

The most current occupational analysis was completed in July of 2023. It is included with this report as Attachment E. The Board typically conducts an occupational analysis every five to seven years. In its new strategic plan, the Board will continue to look at pathways for license reciprocity as well as evaluate the format of the skills portion of the license exam to ensure continued efficacy.

**School approvals**

**28. Describe legal requirements regarding school approval. Who approves your schools? What role does BPPE have in approving schools? How does the board work with BPPE in the school approval process?**

Business and Professions Code 8027 requires court reporting schools to be approved by the Board and the Bureau for Private Postsecondary Education (BPPE), be a California public school, or be accredited by the Western Association of Schools and Colleges (WASC). Any school seeking Board recognition must notify the Board within 30 days of the date on which it provides notice to or seeks approval from the California Department of Education, BPPE, the Chancellor's Office of the California Community Colleges, or WASC. The Board then reviews the proposed curriculum and provides the school tentative approval or denial within 60 days. With an approval, the school then applies for

provisional recognition by the Board. Once granted, the school must operate continuously for no less than three years during which time the school must have at least one person successfully complete the course and pass the CSR examination. Upon completion of those provisions, the school may be granted full recognition.

**29. How many schools are approved by the board? How often are approved schools reviewed? Can the board remove its approval of a school?**

There are eight Board-recognized schools offering court reporting programs in the state of California. The Board grants “recognition” in order for a court reporting school to operate. Schools are asked to send written materials to the Board annually as part of the ongoing review process. No on-site visits have been made since the pandemic. The Board relies, instead, on information submitted annually by the schools regarding enrollment and curriculum. There is currently no bottleneck of qualified graduates waiting to take the license exam.

If a student graduates from a Board-recognized program, they are qualified to take the license exam. If a student graduates from one of the many other programs available across the country, they would need to pass the RPR, CVR, or CVR-S in order to qualify to sit for the exam. There is no shortage of training programs for court reporting.

The Board may remove recognition of a school that does not continue to meet the minimum curriculum and other regulatory requirements regarding recordkeeping.

**30. What are the board’s legal requirements regarding approval of international schools?**

No international schools have applied for Board recognition.

**Continuing Education/Competency Requirements**

**31. Describe the board’s continuing education/competency requirements, if any. Describe any changes made by the board since the last review.**

The Board does not currently have mandatory continuing education requirements for licensure; however, the Judicial Council requires continuing education for all its court employees, including court reporters. *(Questions a through i and Table 8a. are not applicable.)*

- a. **How does the board verify CE or other competency requirements? Has the Board worked with the Department to receive primary source verification of CE completion through the Department’s cloud?**
- b. **Does the board conduct CE audits of licensees? Describe the board’s policy on CE audits.**
- c. **What are consequences for failing a CE audit?**
- d. **How many CE audits were conducted in the past four fiscal years? How many fails? What is the percentage of CE failure?**
- e. **What is the board’s CE course approval policy?**
- f. **Who approves CE providers? Who approves CE courses? If the board approves them, what is the board application review process?**
- g. **How many applications for CE providers and CE courses were received? How many were approved?**
- h. **Does the board audit CE providers? If so, describe the board’s policy and process.**
- i. **Describe the board’s effort, if any, to review its CE policy for purpose of moving toward performance based assessments of the licensee’s continuing competence.**



Table 8a. Continuing Education			
Type	Frequency of Renewal	Number of CE Hours Required Each Cycle	Percentage of Licensees Audited
<i>Not applicable</i>			

## Section 4 – Enforcement Program

### **32. What are the board’s performance targets/expectations for its enforcement program? Is the board meeting those expectations? If not, what is the board doing to improve performance?**

A review of the enforcement division of the Board reveals a workload of approximately 120 complaints per year. The Board is staffed with one full-time enforcement analyst performing all enforcement activities. The majority of complaints requiring additional investigation involve a question of untimeliness of transcript delivery or the accuracy of a transcript of legal proceedings.

Additionally, the Board places a great deal of emphasis on prevention of complaints. Outreach is done via seminars to trade associations both remotely and in person. Enforcement staff responds to complaints and all inquiries (via telephone, fax, mail or e-mail) regarding the complaint process, license status, and the laws and regulations relating to the practice of court reporting.

Whenever possible and appropriate, enforcement staff resolves cases through informal mediation. The Board has found that not only does this quicker resolution save time and money for both parties, but it allows the licensee to continue practicing while the issue is resolved. Most licensees are cooperative once the Board outlines the penalties for noncompliance.

The Board’s performance measures are published on DCA’s website, included as Attachment F. The Board has set a target of five days for intake, the average cycle time from complaint receipt to assignment to investigator. This target is being met. The Board has a target of 60 days for intake to investigation, the average cycle time from complaint receipt to completion of the investigation process. The Board’s average intake and investigation time during the period since the last sunset review is 146 days, meeting the goal of 60 days 50 percent of the time. The Board has a target of 540 days for formal discipline, which is the average number of days for completion of the entire enforcement process for cases resulting in formal discipline. The Board’s average number of days for formal discipline is 331, meeting the target 100 percent of the time.

### **33. Explain trends in enforcement data and the board’s efforts to address any increase in volume, timeframes, ratio of closure to pending cases, or other challenges. What are the performance barriers? What improvement plans are in place? What has the board done and what is the board going to do to address these issues, i.e., process efficiencies, regulations, BCP, legislation?**

The number of complaints filed over the last five years has remained relatively stable. The Board did see an increase in complaints for FY 2022/23 due to the implementation of firm registration. As firms found out and subsequently complied with the new law, the number of complaints related to firms has decreased.

The Board continues to see the main complaints that are filed with the Board are requests for assistance in obtaining a transcript of a reported proceeding. Possible factors could include a shortage of court reporters, which provides the reporter less time to work on transcription, societal changes in work ethic or a combination of those and other factors.

<b>Table 9a. Enforcement Statistics</b>						
	FY 2018/19	FY 2019/20	FY 2020/21	FY 2021/22	FY 2022/23	
<b>COMPLAINTS</b>	CSR	CSR	CSR	CSR	CSR	CRF
<b>Intake</b>						
Received	122	115	105	111	113	41
Closed without Referral for Investigation	0	0	0	0	0	0
Referred to INV	122	115	105	111	113	41
Pending (close of FY)	0	0	0	0	0	0
<b>Conviction / Arrest</b>						
CONV Received	3	0	0	0	0	N/A
CONV Closed Without Referral for Investigation	1	0	1	0	0	N/A
CONV Referred to INV	1	1	0	0	0	N/A
CONV Pending (close of FY)	2	1	0	0	0	N/A
<b>Source of Complaint<sup>7</sup></b>						
Public	61	68	82	90	86	13
Licensee/Professional Groups	27	25	9	18	9	26
Governmental Agencies	29	14	5	3	15	0
Internal	8	8	9	0	2	2
Other	0	0	0	0	0	0
Anonymous	0	0	0	0	1	0
Average Time to Refer for Investigation (from receipt of complaint / conviction to referral for investigation)	1	1	1	1	1	1
Average Time to Closure (from receipt of complaint / conviction to closure at intake)	0	0	0	0	0	0
Average Time at Intake (from receipt of complaint / conviction to closure or referral for investigation)	1	1	1	1	1	1
<b>INVESTIGATION</b>	CSR	CSR	CSR	CSR	CSR	CRF
<b>Desk Investigations</b>						
Opened	125	116	105	111	113	41
Closed	100	91	184	101	116	38
Average days to close (from assignment to investigation closure)	67	82	347	35	49	45
Pending (close of FY)	54	88	8	18	17	3
<b>Non-Sworn Investigation</b>						
Opened	0	0	0	0	0	0
Closed	0	0	0	0	0	0
Average days to close (from assignment to investigation closure)	0	0	0	0	0	0
Pending (close of FY)	0	0	0	0	0	0
<b>Sworn Investigation</b>						
Opened	1	0	0	0	0	0
Closed	1	0	0	0	0	0
Average days to close (from assignment to investigation closure)	41	0	0	0	0	0
Pending (close of FY)	0	0	0	0	0	0

<sup>7</sup> Source of complaint refers to complaints and convictions received. The summation of intake and convictions should match the total of source of complaint.

All investigations <sup>8</sup>						
Opened	125	116	105	111	113	41
Closed	100	91	184	101	116	38
Average days for all investigation outcomes (from start investigation to investigation closure or referral for prosecution)	67	82	347	35	49	45
Average days for investigation closures (from start investigation to investigation closure)	86	83	348	36	50	46
Average days for investigation when referring for prosecution (from start investigation to referral for prosecution)	131	76	204	43	37	0
Average days from receipt of complaint to investigation closure	86	83	348	36	50	46
Pending (close of FY)	54	88	8	18	17	3
<b>CITATION AND FINE</b>	CSR	CSR	CSR	CSR	CSR	CRF
Citations Issued	17	18	11	16	9	0
Average Days to Complete (from complaint receipt / inspection conducted to citation issued)	75	18	130	37	82	0
Amount of Fines Assessed	\$ 22,250	\$ 15,550	\$ 14,000	\$ 23,750	\$9,000	\$ 0
Amount of Fines Reduced, Withdrawn, Dismissed	\$ 2,500	\$ 950	\$ 1,950	\$ 3,500	\$ 500	\$ 0
Amount Collected	\$ 10,700	\$ 12,650	\$ 6,800	\$ 13,083	\$ 3,567	\$ 0
<b>CRIMINAL ACTION</b>	CSR	CSR	CSR	CSR	CSR	CRF
Referred for Criminal Prosecution	0	0	0	0	0	0
<b>ACCUSATION</b>	CSR	CSR	CSR	CSR	CSR	CRF
Accusations Filed	4	4	4	3	2	0
Accusations Declined	0	0	0	0	0	0
Accusations Withdrawn	0	0	3	1	0	0
Accusations Dismissed	0	0	0	0	0	0
Average Days from Referral to Accusations Filed (from AG referral to Accusation filed)	55	90	125	62	85	0
<b>INTERIM ACTION</b>	CSR	CSR	CSR	CSR	CSR	CRF
ISO & TRO Issued	0	0	0	0	0	0
PC 23 Orders Issued	0	0	0	0	0	0
Other Suspension/Restriction Orders Issued	0	0	0	0	0	0
Referred for Diversion	0	0	0	0	0	0
Petition to Compel Examination Ordered	0	0	0	0	0	0
<b>DISCIPLINE</b>	CSR	CSR	CSR	CSR	CSR	CRF
AG Cases Initiated (cases referred to the AG in that year)	4	8	6	3	2	0
AG Cases Pending Pre-Accusation (close of FY)	2	2	0	0	0	0
AG Cases Pending Post-Accusation (close of FY)	1	4	1	1	2	0
<b>DISCIPLINARY OUTCOMES</b>	CSR	CSR	CSR	CSR	CSR	CRF
Revocation	3	3	3	1	1	0
Surrender	1	0	1	1	0	0
Suspension only	0	0	0	0	0	0
Probation with Suspension	0	0	0	0	0	0
Probation only	4	1	2	0	0	0
Public Reprimand / Public Reproval / Public Letter of Reprimand	0	1	1	0	0	0
Other	0	0	0	0	0	0

<sup>8</sup> The summation of desk, non-sworn, and sworn investigations should match the total of all investigations.

<b>DISCIPLINARY ACTIONS</b>	CSR	CSR	CSR	CSR	CSR	CRF
Proposed Decision	2	0	2	0	0	0
Default Decision	1	3	2	1	1	0
Stipulations	5	2	3	1	0	0
Average Days to Complete After Accusation (from Accusation filed to imposing formal discipline)	152	174	184	143	105	0
Average Days from Closure of Investigation to Imposing Formal Discipline	283	243	237	237	163	0
Average Days to Impose Discipline (from complaint receipt to imposing formal discipline)	337	298	328	415	180	0
<b>PROBATION</b>	CSR	CSR	CSR	CSR	CSR	CRF
Probations Completed	3	4	2	2	3	0
Probationers Pending (close of FY)	8	6	5	4	1	0
Probationers Tolerated	2	2	2	2	2	0
Petitions to Revoke Probation / Accusation and Petition to Revoke Probation Filed	1	0	0	0	0	0
<b>SUBSEQUENT DISCIPLINE<sup>9</sup></b>	CSR	CSR	CSR	CSR	CSR	CRF
Probations Revoked	1	0	0	0	0	0
Probationers License Surrendered	0	0	0	0	0	0
Additional Probation Only	0	0	0	0	0	0
Suspension Only Added	0	0	0	0	0	0
Other Conditions Added Only	0	0	0	0	0	0
Other Probation Outcome	0	0	0	0	0	0
<b>SUBSTANCE ABUSING LICENSEES</b>	CSR	CSR	CSR	CSR	CSR	CRF
Probationers Subject to Drug Testing	0	0	0	0	0	0
Drug Tests Ordered	0	0	0	0	0	0
Positive Drug Tests	0	0	0	0	0	0
<b>PETITIONS</b>	CSR	CSR	CSR	CSR	CSR	CRF
Petition for Termination or Modification Granted	0	0	0	0	0	0
Petition for Termination or Modification Denied	0	0	0	0	0	0
Petition for Reinstatement Granted	0	0	0	0	0	0
Petition for Reinstatement Denied	0	0	0	0	0	0
<b>DIVERSION</b>	CSR	CSR	CSR	CSR	CSR	CRF
New Participants	0	0	0	0	0	0
Successful Completions	0	0	0	0	0	0
Participants (close of FY)	0	0	0	0	0	0
Terminations	0	0	0	0	0	0
Terminations for Public Threat	0	0	0	0	0	0
Drug Tests Ordered	0	0	0	0	0	0
Positive Drug Tests	0	0	0	0	0	0

<sup>9</sup> Do not include these numbers in the Disciplinary Outcomes section above.

**Table 10. Enforcement Aging**

	FY 2018/19	FY 2019/20	FY 2020/21	FY 2021/22	FY 2022/23		Cases Closed		Average %	
	CSR	CSR	CSR	CSR	CSR	CRF	CSR	CRF	CSR	CRF
<b>Investigations (Average %)</b>										
Closed Within:										
90 Days	75	67	88	93	101	37	424	37	72%	97%
91 - 180 Days	14	12	20	7	14	1	67	1	11%	3%
181 Days - 1 Year	4	11	21	1	1	0	38	0	6%	0%
1 - 2 Years	7	1	20	0	0	0	28	0	5%	0%
2 - 3 Years	0	0	12	0	0	0	12	0	2%	0%
Over 3 Years	0	0	23	0	0	0	23	0	4%	0%
Total Investigation Cases Closed	100	91	184	101	116	38	592	38	100%	100%
<b>Attorney General Cases (Average %)</b>										
Closed Within:										
0 - 1 Year	5	3	5	1	1	0	15	0	62.5%	0%
1 - 2 Years	4	2	2	1	0	0	9	0	37.5%	0%
2 - 3 Years	0	0	0	0	0	0	0	0	0%	0%
3 - 4 Years	0	0	0	0	0	0	0	0	0%	0%
Over 4 Years	0	0	0	0	0	0	0	0	0%	0%
Total Attorney General Cases Closed	9	5	7	2	1	0	24	0	100%	0%

**34. What do overall statistics show as to increases or decreases in disciplinary action since last review?**

The number of complaints has remained consistent, averaging 121 a year. There are two reasons for the relatively low number. First, court reporters are acutely aware of the law and the effects for acting outside of the law. Secondly, as the licensing examination tends to be quite difficult, most licensees are very careful not to place their license in jeopardy.

**35. How are cases prioritized? What is the board’s complaint prioritization policy? Is it different from DCA’s *Complaint Prioritization Guidelines for Health Care Agencies* (August 31, 2009)? If so, explain why.**

The Board uses the complaint prioritization guidelines from DCA. Under this model, enforcement staff reviews complaints upon receipt to determine the best course of action based on the priority assigned. These guidelines are included as Attachment K.

**36. Are there mandatory reporting requirements? For example, requiring local officials or organizations, or other professionals to report violations, or for civil courts to report to the board actions taken against a licensee. Are there problems with the board receiving the required reports? If so, what could be done to correct the problems?**

- a. What is the dollar threshold for settlement reports received by the board?
- b. What is the average dollar amount of settlements reported to the board?

The only mandatory reporting requirement is on the license renewal form on which licensees are required to self-report any convictions.

**37. Describe settlements the board, and Office of the Attorney General on behalf of the board, enter into with licensees.**

**a. What is the number of cases, pre-accusation, that the board settled for the past four years, compared to the number that resulted in a hearing?**

No cases settled prior to the filing of the accusation.

**b. What is the number of cases, post-accusation, that the board settled for the past four years, compared to the number that resulted in a hearing?**

Of the 17 accusations filed, five were settled prior to hearing. Seven defaulted, two went to hearing, one was withdrawn, and two are pending.

**c. What is the overall percentage of cases for the past four years that have been settled rather than resulted in a hearing?**

Five cases settled out of the 17 accusations filed for an overall percentage of 29%. If the seven defaults are included, the overall percentage is 71%.

**38. Does the board operate with a statute of limitations? If so, please describe and provide citation. If so, how many cases have been lost due to statute of limitations? If not, what is the board's policy on statute of limitations?**

The Board does not have a statute of limitations with regard to enforcement. There are statutory requirements for court reporters to retain their stenographic notes. California Code of Civil Procedure 2025.510(e) requires notes of depositions be retained for eight years from the date of the deposition where no transcript is produced and one year from the date on which the transcript is produced. On the official side, California Government Code 69955(e) requires notes to be retained for ten years from the taking of the notes in a criminal proceeding and five years in all other proceedings, except capital felony cases in which case the notes are only destroyed upon court order. If there is a complaint about accuracy of the transcript and the notes have been disposed of in accordance with the statutory requirements, there is nothing for the Board to review. If the court or court reporter continues to retain the notes, however, the complaint is processed normally.

**39. Describe the board's efforts to address unlicensed activity and the underground economy.**

There are court reporters who neglect to renew their licenses on time but continue to report, which is unlicensed activity from the standpoint that they are working without a current license. The Board issues citations and fines for this violation.

With the advent of remote reporting, there is an uptick in unlicensed reporting of depositions from reporters from other states. Even if the attorneys are remotely appearing from other states, if the witness is located in California, California laws apply. The Board has attempted to educate attorneys on the importance of hiring a licensed court reporter and encourages court reporters to state their license number at the beginning of each proceeding.

The passage of AB 156 in September of 2022 added additional terms to section 8018 of the Business & Professions Code in order to help consumers be clear on who they are hiring to report their proceeding. The law states that except as provided in Section 8043, no other person, entity, firm, or

corporation may assume or use the title “certified shorthand reporter,” or the abbreviation “C.S.R.,” or use any words or symbols indicating or tending to indicate that they are, or it is, certified under this chapter. Use of the words “stenographer,” or “reporter,” or of the phrases “court reporter,” “deposition reporter,” or “digital reporter,” in combination with words or phrases related to the practice of shorthand reporting, as defined in Section 8017, indicates or tends to indicate certification pursuant to this chapter.

To address transparency and enforcement issues, the Board worked with Senator Umberg’s office in 2021 on the eventual successful passage of SB 241 (Umberg). This bill provided comprehensive firm registration. Consumers now are protected when they hire a registered firm, regardless of whether or not it is owned by a licensee.

## **Cite and Fine**

**40. Discuss the extent to which the board has used cite and fine authority. Discuss any changes from last review and describe the last time regulations were updated and any changes that were made. Has the board increased its maximum fines to the \$5,000 statutory limit?**

Each complaint is considered on a case-by-case basis. Many factors go into the decision of whether to issue a citation and/or fine, including the violation, mitigating circumstances, prior issues (or lack thereof).

The Board has not increased its maximum fines to the \$5,000 statutory limit.

**41. How is cite and fine used? What types of violations are the basis for citation and fine?**

The cite and fine is used to gain compliance with the statutes and regulations governing court reporting, not as a form of punishment. The most common violations are untimely delivery of transcripts or unexcused failure to transcribe, unprofessional conduct, or working with an expired license (unlicensed activity).

**42. How many informal office conferences, Disciplinary Review Committees reviews and/or Administrative Procedure Act appeals of a citation or fine in the last 4 fiscal years?**

There have been 19 informal conferences since the last sunset review.

**43. What are the five most common violations for which citations are issued?**

The most common violations for which citations are issued include the following:

- Failure to produce a transcript
- Untimely production of a transcript
- Working without a valid license
- Accuracy of the transcript
- Loss of stenographic notes

**44. What is average fine pre- and post- appeal?**

The average fine pre-appeal is \$905.26 and post-appeal is \$594.73.

**45. Describe the board's use of Franchise Tax Board intercepts to collect outstanding fines.**

Staffing resources are such that this option is currently not used.

**Cost Recovery and Restitution**

**46. Describe the board's efforts to obtain cost recovery. Discuss any changes from the last review.**

The Board's policy is to request cost recovery in every instance where the case merits recovery and is ordered by the administrative law judge or negotiated through a stipulated settlement. Typically, the amount ordered in a cost recovery encumbers costs for the Attorney General's Office only. The Board is generally successful in collecting these amounts, as seen on Table 11, with the use of a payment plan to assist the licensee in paying over time.

**47. How many and how much is ordered by the board for revocations, surrenders and probationers? How much do you believe is uncollectable? Explain.**

As demonstrated in Table 9a, there have been 11 revocations in the last five fiscal years, three voluntary surrenders, and seven placed on probation. Table 11 shows the amounts ordered and collected for those years. Another tool the Board has employed in obtaining full recovery is working with probationers to set up a payment plan over time, rather than demanding the payment in full at the time of the decision.

**48. Are there cases for which the board does not seek cost recovery? Why?**

Cost recovery is always initially requested, but on a very rare occasion the Board will abandon the request as part of a stipulated settlement.

**49. Describe the board's use of Franchise Tax Board intercepts to collect cost recovery.**

Staffing resources are such that this option is currently not used.

**50. Describe the board's efforts to obtain restitution for individual consumers, any formal or informal board restitution policy, and the types of restitution that the board attempts to collect, i.e., monetary, services, etc. Describe the situation in which the board may seek restitution from the licensee to a harmed consumer.**

There is no statutory authority for Board-ordered restitution. However, the Board has maintained a proactive stance in assisting consumers in receiving money owed to them. The claims are based on fees charged by official court reporters for transcripts, which are regulated by law in Government Code 69950. There are no statutory fee requirements for work performed in a deposition or hearing setting by a freelance reporter.



<b>Table 11. Cost Recovery<sup>10</sup></b> (list dollars in thousands)					
	FY 2018/19	FY 2019/20	FY 2020/21	FY 2021/22	FY 2022/23
Total Enforcement Expenditures	\$ 236,000	\$ 258,000	\$ 208,000	\$ 211,000	\$ 223,000
Potential Cases for Recovery *	7	5	7	2	1
Cases Recovery Ordered	3	0	3	0	0
Amount of Cost Recovery Ordered	\$ 4,737.50	\$ 0	\$ 6,522.50	\$ 0	\$ 0
Amount Collected	\$ 2,229.62	\$ 2,206.50	\$ 6,639.50	\$ 1,630.00	\$ 500.00

\* "Potential Cases for Recovery" are those cases in which disciplinary action has been taken based on violation of the license practice act.

<b>Table 12. Restitution</b> (list dollars in thousands)					
	FY 2018/19	FY 2019/20	FY 2020/21	FY 2021/22	FY 2022/23
Amount Ordered	0	0	0	0	0
Amount Collected	0	0	0	0	0

<sup>10</sup> Cost recovery may include information from prior fiscal years.

## Section 5 – Public Information Policies

**51. How does the board use the internet to keep the public informed of board activities? Does the board post board-meeting materials online? When are they posted? How long do they remain on the board's website? When are draft-meeting minutes posted online? When does the board post final meeting minutes? How long do meeting minutes remain available online?**

The Board uses its website, [www.courtreporters.ca.gov](http://www.courtreporters.ca.gov), to provide transparency into the Board's activities. It is the Board's intent to post as much information as possible as more and more people are gaining information via the Internet. On the Board's website, the public can find out who the Board members are, where and when the Board meets and hold exams, everything from the Board's history to its current strategic plan. Additionally, applicants can obtain information regarding all three portions of the license examination, from application to grading policies, lists of court reporting schools to examination statistics broken down by school. The Consumer tab gives information on the complaint process, including providing the complaint form, information on disciplinary action taken against licensees, and information on how students may complain. Complete information about the Transcript Reimbursement Fund has been moved to a dedicated tab.

The Board makes every effort to have meeting materials available via the website ten days before the actual meeting date. Minutes from meetings are posted as soon as they are approved by the Board. Minutes from past Board meetings are available back to 2009. Draft minutes are not posted.

**52. Does the board webcast its meetings? What is the board's plan to webcast future board and committee meetings? How long do webcast meetings remain available online?**

The Board utilizes the services of DCA's Office of Public Affairs (OPA) to webcast its meetings when sufficient Internet services are available at the meeting location and OPA has staff available. The Board prefers to webcast all of their Board meetings but does not webcast task force meetings. The webcasts are available online for a couple of years, as DCA's server space is available. Since the pandemic, the Board has used WebEx to conduct remote meetings. With the expiration of the Bagley-Keene waivers, the Board meets in person but also used the WebEx platform to allow the public to attend. The Board has seen an increase in public participation when offering a remote platform.

**53. Does the board establish an annual meeting calendar, and post it on the board's web site?**

The Board does not establish an annual meeting calendar but does post meetings on the Board's website as soon as the date and location are confirmed.

**54. Is the board's complaint disclosure policy consistent with DCA's *Recommended Minimum Standards for Consumer Complaint Disclosure*? Does the board post accusations and disciplinary actions consistent with DCA's *Web Site Posting of Accusations and Disciplinary Actions (May 21, 2010)*?**

The complaint disclosure policy is set by Business and Professions Code 8010. It provides that information regarding a complaint against a specific licensee not be disclosed until the Board has filed an accusation and the licensee has been notified of the filing of the accusation against his or her license. This does not apply to citations, fines, or orders of abatement, which are disclosed to the public upon notice to the licensee. These are also posted on the Board's website. This is consistent with DCA's complaint disclosure and public disclosure policies.

**55. What information does the board provide to the public regarding its licensees (i.e., education completed, awards, certificates, certification, specialty areas, disciplinary action, etc.)?**

The Board verifies whether a license is in good standing, when it was issued, and when it will expire, as well as an address of record. All disciplinary actions, including citations and fines, are available to the public on the Board website.”

**56. What methods are used by the board to provide consumer outreach and education?**

The Board utilizes its website and social media accounts as the main source of consumer education.

Licensee Board members and the executive officer participate in trade association meetings at local, state, and national levels. They also make presentations at career fairs and high school events. Seminars are prepared and given at industry conferences, specifically for the California Court Reporters Association and the Deposition Reporters Association, as well as at court reporting schools.

To maximize resources, the Board continually seeks to develop other outreach methods, including renewal form inserts and webinars. Additionally, the Board utilizes an e-mail subscription service to alert interested parties as to Board activities.

## **Section 6 – Online Practice Issues**

**57. Discuss the prevalence of online practice and whether there are issues with unlicensed activity. How does the board regulate online practice? Does the board have any plans to regulate internet business practices or believe there is a need to do so?**

The court reporting industry has used videoconferencing for many years, but pre-pandemic its use was occasional. During the pandemic, attorneys embraced the videoconference platform, and all depositions were conducted remotely. When courtrooms opened again, the reporter was required to be in the courtroom with the judge. The exception to this is some civil trials were conducted remotely, including the court reporter. Post-pandemic, depositions have remained mostly remote.

Remote reporting comes with its own set of challenges. Connectivity issues can make it hard or even impossible for the court reporter to report, and sometimes the court reporter is dropped from the proceeding. To help navigate this world, the Board developed Best Practice Pointers for Remote Reporting. This has helped answer many questions from the field, but this is definitely an evolving field as everyone tries to successfully make the transition.

The Board encourages all licensees to state their license number at the beginning of the proceeding.

## Section 7 – Workforce Development and Job Creation

### **58. What actions has the board taken in terms of workforce development?**

The biggest step forward in terms of workforce development for the Board has been the ability to license voice writers. Voice writers do the exact same job as steno writers but with different equipment. Voice writers program personal dictionaries using voice recognition software while steno writers use a stenotype machine with computer aided transcription software. Testing voice writers expands the candidate pool for the license exam as voice writing is already practiced in 38 other states and the military. Because it's already in use, there are many training programs in place.

Since it began licensing voice writers, the Board has seen an increase in the number of applications to sit for the exam. As of December 1, 2023, 16 voice writers have passed all three portions of the exam to become CSRs.

Additionally, the training program is much shorter than it is for steno writers. Steno writers must learn a form of shorthand that is equivalent to learning a foreign language. Voice writers use a shorthand that is based on English. There is also a higher completion rate for the voice writer training program than the steno training program.

The shorter training period and the higher completion rate allow voice writing programs to better align with vocational education requirements. The first CRB-recognized school to teach voice writing has a waiting list for enrollment. At least three other schools are including voice writing in their court reporting programs, and enrollment is up.

In addition to licensing voice writers, the

has explored a number of license reciprocity options and is currently working with OPES to evaluate the CVR and CVR-S certifications from NVRA.

### **59. Describe any assessment the board has conducted on the impact of licensing delays.**

The Board has experienced no licensing delays.

### **60. Describe the board's efforts to work with schools to inform potential licensees of the licensing requirements and licensing process.**

Board staff meets with schools as a group three times a year as a guest at their association meeting. Board staff is also available upon request to speak at court reporting schools at all levels, from beginning classes to more advanced classes.

### **61. Describe any barriers to licensure and/or employment the board believes exist.**

To be very literal, the only barrier to employment is licensure and successful completion of the license exam. The license exam is difficult but rigorously reviewed to ensure it is testing for entry-level skills only while recognizing the need for verbatim accuracy.

By allowing voice writers to test and become licensed, the Board has moved to reduce one barrier to licensure. Not only do voice writers benefit from a shorter training period, but voice writing also offers

easy retraining for steno reporters who have become injured and can no longer practice using the steno machine method.

The Board, through its reciprocity efforts, has also looked at the possibility of changing the format of the skills portion of the license exam to align with other state and national certification testing.

**62. Provide any workforce development data collected by the board, such as:**

**a. Workforce shortages**

The court reporting industry has suffered the same post-pandemic labor shortages as every other segment of the economy. Remote reporting has tempered this effect in the deposition field as reporters are more easily able to cover multiple depositions in a single day without the travel time to and from actual deposition locations.

The Judicial Council has reported a shortage of court reporters. Unfortunately, beginning in 2011, courts stopped providing court reporters in civil matters, forcing civil litigants to privately hire court reporters in order to have a record for appeal. This has created a thriving freelance market for civil court work. While the rates for transcripts are set in statute, other costs, such as appearance fees, are not. The courts now have a challenge making an official position competitive with the freelance marketplace.

**b. Successful training programs.**

Pass rates for each school are included as Attachment J.

**63. What efforts or initiatives has the board undertaken that would help reduce or eliminate inequities experienced by licensees or applicants from vulnerable communities, including low- and moderate-income communities, communities of color, and other marginalized communities, or that would seek to protect those communities from harm by licensees?**

The court reporting industry has long been welcoming to low-income and historically marginalized individuals. The flexible schedule of deposition work makes it attractive for single parents yet allows them to earn enough to support their families. The workforce is mainly women and is very diverse as far as ethnicity.

On the consumer side, the Board administers the Transcript Reimbursement Fund to help qualified indigent litigants pay for their civil transcripts.

## Section 8 – Current Issues

### **64. What is the status of the board's implementation of the Uniform Standards for Substance Abusing Licensees?**

Substance abuse has not manifested itself as an issue with the court reporting industry. The rare cases that appear are dealt with on a case-by-case basis.

### **65. What is the status of the board's implementation of the Consumer Protection Enforcement Initiative (CPEI) regulations?**

The Board participates in updating and standardizing its enforcement reporting as a part of the DCA's continuing support and tracking, more currently referred to as Enlighten Enforcement. As demonstrated in the Board's performance measures, enforcement targets have been set and progress is monitored to ensure goals are achieved.

### **66. Describe how the board is participating in development of BreEZe and any other secondary IT issues affecting the board.**

#### **a. Is the board utilizing BreEZe? What Release was the board included in? What is the status of the board's change requests?**

The Board is not on BreEZe.

#### **b. If the board is not utilizing BreEZe, what is the board's plan for future IT needs? What discussions has the board had with DCA about IT needs and options? What is the board's understanding of Release 3 boards? Is the board currently using a bridge or workaround system?**

The Board is currently in the process of changing to the Connect system through an extensive IT modernization project funded by a grant from the California Department of Technology's Technology Modernization Fund. Board staff worked with DCA's Office of Information Services to compete for funds, and it was granted \$960,000 for the Board's IT modernization efforts.

## Section 9 – Board Actions and Responses to COVID-19.

**67. In response to COVID-19, did the board take any steps or implement any policies regarding licensees or consumers? Has the board implemented any statutory revisions, updates or changes that were necessary to address the COVID-19 Pandemic? Any additional changes needed to address a future State of Emergency Declaration.**

During COVID, an emergency measure was put in place via legislation authored by Senator Umberg, which waived the requirement for the court reporter to be in the physical presence of a party witness. Post-COVID, this waiver was made permanent as the deposition field continues to embrace the remote platform.

The biggest change resulting from the COVID restrictions was switching the in-person skills portion of the license exam to an online platform. Luckily, a contract was in place as the Board was beginning a pilot project to offer online testing as well as in-person testing. Tests were developed, recorded and uploaded to the third-party vendor, Realtime Coach. This allowed the Board to continue to issue licenses without any gap at all, an important protection for consumers.

There have been two benefits as a result of the online move. The biggest benefit has been the stabilization of pass rates. Historically, the pass rate would vary greatly, from as low as 13.5% to as high as 87.8%. Since the online change, pass rates have varied only between 50% to 58.8%.

The second benefit has been economic. The in-person tests are offered at hotels as two large rooms are required, one for dictation and one for transcription. The transcription room requires a power source for laptops and printers for 100 people. In addition to the cost of the actual meeting space, the travel cost for Board staff and the dictation readers is necessary.

The cost savings was not just to the Board, but also to the candidates, who saved travel and hotel costs.

## Section 10 – Board Action and Response to Prior Sunset Issues

Include the following:

1. Background information concerning the issue as it pertains to the board.
2. Short discussion of recommendations made by the Committees during prior sunset review.
3. What action the board took in response to the recommendation or findings made under prior sunset review.
4. Any recommendations the board has for dealing with the issue, if appropriate.

(Following are the issues from the prior oversight committee, the prior committee staff recommendation, and the prior Board's response. Current Board responses are indicated by \*\* and are underlined.)

**Issue #1: What is the status of the Transcript Reimbursement fund?**

**Staff Recommendation: *The Board should report at the hearing on the most recent revenue and expenditure projections for the Court Reporters Fund and when transfers to the TRF will resume.***

**Board Response:** Funded completely from court reporter license fees, the TRF was set up to assist qualified indigent litigants with transcript costs. The fund has two programs. The main fund, or Pro Bono Program, was set up in 1981 and requires indigent litigants to have a pro bono attorney handling the case. In 2011, a two-year pilot project was developed to allow pro per litigants, litigants representing themselves, access to the fund. The pilot project was a success and is now a permanent part of the TRF as the Pro Per Program. Business and Professions Code (BPC) 8030.2 authorizes the Board to transfer funds to the TRF in increments of \$100,000 for a total of \$300,000 annually.

During the Board's last sunset review, the cap for the Pro Per Program was raised from \$30,000 to \$75,000. This became effective January 1, 2017, and the Board was able to process twice the number of claims as in prior years. The Pro Bono Program receives \$225,000 from the total amount transferred.

Another change as a result of the last sunset review was the exclusion of vexatious litigants from the TRF beginning January 1, 2017. As a result of that change, 45 applications have been returned.

BPC 8030.2(a) provides that a transfer to the TRF shall not be made by the Board if the transfer will result in the reduction of the balance of the Court Reporters Fund to an amount less than six months' operating expenses. The Board was unable to transfer funds to the TRF beginning in fiscal year 2017-18. The Board was able to continue to process applications received through July 6, 2017, with the remaining funds previously transferred to the TRF. At the time the TRF ran out of money, the Board's fee increase regulations package was still under Department and Agency review and had not yet been submitted to OAL for review. Therefore, it was deemed prudent to send the remaining applications back to the claimants with information on how to resubmit when the fund reopened.

The license fee increase portion of the regulations package was approved and became effective January 1, 2019. The latest revenue and expenditure projections indicate that a transfer can be made in July 2020. The Board is working with DCA Budgets to closely follow revenue projections monthly as the license fee increase goes through its first year of implementation. By February of 2020, we will have a full year of data with the increase in place, which will allow us to better project when a transfer could be made. The intention is to transfer \$100,000 as soon as the Board is able to do so without compromising the required six months' operating expenses reserve.

\*\*\*Current Board Response: The Board reopened the TRF in November of 2020 with an initial transfer of \$100,000 from the Court Reporters Fund. The Board contacted pro bono firms and the courts statewide to notify as many users as possible. Additionally, the Board notified stakeholders via its website and social media accounts and informed the state trade associations. Since reopening the TRF, the Board has processed 765 applications, approving \$377,682.

For additional funding, in 2021, the Board received a one-time transfer of \$500,000 from the General Fund to the TRF.

**Issue #2:** Should certified shorthand reporters be allowed to use "voice writing" systems?

**Staff Recommendation:** *The Business & Professions Code should be amended to clarify that voice writing is authorized as a method of shorthand reporting. Further, the Business and Professions Code should be amended to require a certified shorthand reporter to demonstrate competence, through the practical examination, in whichever or both forms of shorthand reporting that the reporter would then be authorized to use under the certification.*



**Board Response:** At its July 2018 meeting, the Board was able to view a demonstration of voice writing realtime technology. It became apparent to the Board that voice writing and steno writing are the same skill but using differing technologies to capture the shorthand. Because of the similarity, voice writers will be able to take the exact same examination in order to become certified.

The Board originally proposed testing current licensees who want to switch from steno writing to voice writing but discovered it does not have legislative authority to do so. Legislative staff recommends demonstrating competency in either or both methods, grandfathering in all current licensees as steno writers. A legislative change will be needed to affirm that current certificate holders will have to retest the skills portion of the exam if they wish to change reporting methodologies.

The Board is happy to place the legislative staff recommendations on the next meeting agenda for consideration.

\*\*\*Current Board Response: The Board has been licensing voice writers since November of 2022 as a result of trailer bill language passed effective July of 2022. The Board has issued 16 licenses to voice writers to date.

Currently four of the CRB-recognized court reporting programs have added voice writing programs to their curriculum, and enrollment is increasing.

The Board submitted a regulations package on November 1, 2023, to the Office of Administrative Law to update the curriculum requirements to include voice writing. To clarify, only the skills portion of the license exam and training programs has changed as the academic portions are the same for both methods of reporting.

**Issue #3: Should the Board require certified shorthand reporters to meet new continuing education requirements?**

***Staff Recommendation: The Board should report to the committees on what information it believes should be included in a continuing education requirement, who would provide such continuing education, at what cost [to] certified shorthand reporters, and whether there are any other means available to the Board to assist certified shorthand reporters in keeping apprised of changes in law or regulation.***

**Board Response:** A continuing education requirement of 30 hours over a three-year period, which is similar to the requirements to maintain national certification, is the Board's recommendation. Additionally, 10 of those hours should be ethics courses. The Board suggests a mandate from the Legislature requiring proof of completion be sent to the Board as a condition of license renewal. The Board will track the continuing education with existing staff.

Because there is already a requirement for continuing education for national certification as well as for official court reporters in California, there are many companies providing classes offered for continuing education credit. The cost for continuing education courses varies from conference/seminar registration for state and/or national events, to free tests given on material provided by the national association. In addition to allowing for a discretionary hardship waiver, the Board would work with SOLID, DCA's training unit, to develop testing materials on Board publications such as their newsletter or website.

The Board keeps its website updated with all changes to laws and regulations as well as publishing a newsletter twice a year with such changes. The Board also distributes news of law and regulation changes via its email subscription list. All of these alternate methods of education are voluntary and already in place, suggesting the mandatory component would be necessary to ensure all licensees are up-to-date.

\*\*\*Current Board Response: The Board is supportive of mandatory continuing education for court reporters to help ensure reporters are current with changes in technology, laws, and regulation. While a number of court reporters pursue higher certifications through the National Court Reporters Association, there are many reporters who feel that once they pass the California license exam, they are finished with their education. While the Board strives to inform licensees of industry changes, there is no way to ensure all licensees are keeping up to date.

#### **Issue #4: What is the Board's plan for implementing an online skills examination?**

***Staff Recommendation: The Board should report to the committees on its efforts to implement online testing, including the time frame for implementation, projected costs/cost savings, the procedures that will be used to ensure that the online test is secure, and protections that will be used to prevent fraudulent test taking.***

**Board Response:** The Board is finalizing the contract to implement online skills testing and should be able to offer an online option to candidates beginning with the July 2019 testing cycle. This is the culmination of work done by a task force made up of educators and court reporters from across the state. The Board reviewed their findings and adopted a plan to move forward at their July 2017 meeting. Extensive vetting was done with the testing vendor to ensure that the test will be secure. In addition to the current methods used to verify candidate identification, the online test will be monitored by a live proctor. Candidates will need a webcam that can pan the room to ensure only the candidate is present. Once that and the identification is verified, the webcam will be placed to show the candidate's hands. Candidates will have a set amount of time to upload their notes after reporting the examination, after which they will complete the editing process and upload a final transcript. As is the current practice, candidates that pass the exam will have their notes reviewed.

The Board will save between \$50,000 and \$75,000 per year by moving the skills portion to an online format. That represents the cost of the hotel contract as well as staff travel costs. There will also be a cost savings to the candidates who will not have travel and hotel expenses.

\*\*\*Current Board Response: The Board successfully moved to online testing of the skills portion of the exam in July of 2020. The initial plan was to offer both online and in-person testing, but the advent of the COVID pandemic forced the testing to be offered only via a remote platform.

The Board uses a third-party vendor, Realtime Coach, to administer the online skills testing. Candidates are offered a random test from the test bank under the supervision of a live remote proctor who also oversees the transcription of the test by the candidate.

In addition to realizing cost savings to the Board, candidates also enjoy the freedom from travel and hotel expenses associated with in-person testing.

The secondary benefit has been the stabilization of pass rates. Historically, the pass rate would vary greatly, from as low as 13.5% to as high as 87.8%. Since the online change, pass rates have varied only between 50% to 58.8%.

**Issue #5:** Does the new test for determining employment status, as prescribed in the court decision *Dynamex Operations West Inc. v. Superior Court*, have any potential implications for licensees working in the shorthand reporting profession as independent contractors?

**Staff Recommendation:** *The Board should inform the committees of any discussions it has had about whether the Dynamex decision may somehow impact the current practice of shorthand reporting.*

**Board Response:** While the Dynamex decision has implications for the court reporting industry, it is outside the Board's scope. The current business practice in the freelance arena is for court reporting firms to hire court reporters as independent contractors, and the Dynamex decision will have an impact on that business model. However, the Board has no jurisdiction over whether a firm hires court reporters as employees or as independent contractors.

\*\*\*Current Board Response: The Board still does not have jurisdiction over whether a court reporting firm decides to hire court reporters as employees or independent contractors.

**Issue #6:** Is the Board able to enforce court reporting statutes against foreign court reporting corporations?

**Staff Recommendation:** *The Board should advise the Committees as to whether the Board believes that the unpublished appellate ruling in the Holly Moose case indicates that the courts would revisit the Board's authority over out-of-state corporations that arrange shorthand reporting services and whether the Board intends to begin taking disciplinary action against out-of-state corporations for unlicensed practice.*

**Board Response:** No, the Board is not able to enforce the entirety of court reporting statutes against foreign court reporting corporations, but it can now bring a civil action against them in some instances. Due to the successful passage of Board-sponsored AB 2084 (Kalra), BPC section 8050 was added to the Board's practice act. BPC section 8050 lists those, to include non-licensee-owned firms, that shall not charge for a transcript formatted in violation of the Minimum Transcript Format Standards, which are defined in regulation. Nor may they charge any fees for court transcripts other than the fees set out in the Government Code. Additionally, all transcripts must be made available to all parties at the same time, and all parties must be notified of a request for preparation of all or any portion of a transcript, including excerpts and expedites.

While the remedy for these violations is civil litigation rather than an administrative action directly from the Board, it is now clear that the requirements of this section apply to out-of-state corporations, and there is a civil remedy for violation. As with all enforcement decisions, the Board would investigate and evaluate each complaint individually.

As far as being able to enforce the remaining body of law that pertains to court reporting against foreign court reporting corporations, the Board currently lacks jurisdiction to enforce its laws against foreign corporations because the BPC does not currently authorize "foreign professional corporations" to perform court reporting services (*Court Reporters Board of California v. U.S. Legal Support*, Corrected Final Statement of Decision, 111CV197817, pp 5-6, June 21, 2012).

The Board is currently in a powerless position where it cannot enforce court reporting statutes against foreign court reporting corporations because they do not meet the definition of "foreign professional corporation" as set out in Corporations Code section 13401(c), yet the Board cannot cite them for

unlicensed activity either because there is no requirement for businesses to be licensed with the Board.

The Board cannot speculate based solely upon the unpublished appellate ruling in *Moose v. U.S. Legal* whether the courts would revisit the Board's authority over out-of-state corporations. The Board would rather obtain clarity from the Legislature than use its scarce resources to fund another lawsuit in an unpredictable attempt to clarify jurisdiction. To enforce all court reporting laws universally, the Board would need a statute specifically authorizing foreign professional corporations to perform court reporting services.

Some members of the industry have attempted to characterize the Board's lack of jurisdiction as a lack of willingness to take action against out-of-state corporations for unlicensed practice. Current law is not specific enough for the Board to successfully pursue such an action. Existing law is silent as to foreign professional corporations, neither restricting them from practice nor granting them authority to do so.

To enable the Board to enforce its court reporting statutes and regulations against foreign court reporting corporations, the Board needs a statute added to Article 5, "Shorthand Reporting Corporations" of Chapter 13, of Division 3 of the BPC authorizing "foreign professional corporations" to perform court reporting services. Clarification of jurisdiction from the Legislature would greatly benefit the California consumer, who would then be able to turn to the Board for problems if needed.

\*\*\*Current Board Response: The passage of SB 241 (Umberg) in September 2021 allowed the Board to begin registration of court reporting firms. It took the better part of a year to get the IT infrastructure in place, and registration began in July of 2022.

This is a huge benefit to the consumers of California. Prior to the passage of the bill, consumers that happened to hire a firm that was not owned by a licensee had no assistance from the Board in resolving a complaint. Now the Board is able to investigate and act if a violation is found.

The Board currently has 213 registered firms.

#### **Issue #7: What is the status of BreZE implementation by the Board?**

**Staff Recommendation: *The Board should update the Committees about the current status of its Organization Change Management Process and the most-recent timelines for replacing its existing information technology system.***

**Board Response:** Facilitated by SOLID, DCA's training unit, the Board has completed all of the mapping of its business processes. In the next step, DCA will be using the business mapping to identify the Board's business requirements. The required Project Approval Lifecycle (PAL) approval process for all technology projects is underway. The Board and DCA have begun drafting the Stage 1 documentation on schedule as of February 2019. As the PAL process moves forward, the Board looks to join other boards to gain efficiencies in the procurement process and identify cost sharing opportunities. The current schedule is as follows:

- PAL Stage 1 – Begins 2/2019
- PAL Stage 2 – Begins 5/2019
- PAL Stage 3 – Begins 9/2019
- PAL Stage 4 – Begins 12/2019
- Project/Development Begins – 6/2020

\*\*\*Current Board Response: The Board has elected not to use the BreEZe platform. Instead, it has opted to develop inLumon's (Connect) commercial off-the-shelf (COTS) license management software that is currently utilized by ten (10) Boards and Bureaus at the Department of Consumer Affairs (DCA).

In late 2021, the DCA Office of Information Services (OIS) and the Board applied to the California Department of Technology's (CDT) Technology Modernization Fund (TMF). Per CDT's website, "The TMF was established to make immediate investments in IT that will yield quick and meaningful results for the people of California." The Board was awarded a grant of \$960,000 from the TMF in the spring of 2022. Once the required interagency agreements were successfully completed with CDT, solicitation documents were prepared, conducted, and executed to purchase the inLumon software and retain a software implementation team.

Upon concluding project conception and initiation with CDT TMF, the Board entered the planning phase for the modernization project and staff began meeting with a DCA OIS Project Manager to define the scope, budget, and the work breakdown schedule. Weekly meetings were held to help Board staff with writing scope documents and preparing information for use by developers on forms and processes in anticipation of contract execution with the software implementation team.

In June of 2022 contracts were executed to launch the project execution phase and work began with the system implementation team to develop software functionality that supports the scope documents and the Board processes. The project is scheduled for completion on June 30, 2024.

The scope of the project includes removing the Board from the CAS and ATS legacy systems. At the conclusion of the project, consumers will be able to file a complaint online. Also, exam candidates will be able to apply online as well as apply for a license upon successful completion of the testing process. Licensees will be able to renew online. And finally, applicants to the TRF will be able to submit an application online.

**Issue #8: Necessary technical changes to Chapter 13 of the Business and Professions Code (Section 8000 et seq.)**

**Staff Recommendation: In order to simplify the administration of the TRF, Section 8030.6 of the Business and Professions Code should be amended to clarify that the Pro Per program should also operate on a fiscal year basis.**

**In order to clarify the Board's authority to impose a separate fee for each portion of the examination, Business and Professions Code Section 8031(b) should be amended to clarify the current format of the examination.**

**Board Response:** The Board is in agreement with the staff recommendations.

\*\*\*Current Board Response: This change has been made.

**The Board has the following additions:**

**Request #1: Licensees and firms should be required to maintain a public email. The Board would need authorization to collect and publish this information.**

Currently the Board is only allowed to share a mailing address for licensees. If a litigant is trying to get a transcript on an expedited basis, regular mail is completely inadequate.

**Request #2:** The 30-day processing time for TRF applications per BPC 8030.6(a)(8) should be extended to 90 days to align with Rule of Court 8.130. This change would reduce confusion for the applicant.

**Issue #9: Should the licensing and regulation of shorthand reporters be continued and be regulated by the Board?**

**Staff Recommendation:** *Recommend that the licensing and regulation of shorthand reporters continue to be regulated by the Board in order to protect the interests of the public and be reviewed once again in four years.*

**Board Response:** Court reporters play an essential role in our judicial system as a neutral third party who creates verbatim transcripts of proceedings in a timely fashion, thus ensuring the appeal rights of all litigants. Under the watchful eye of the Board, court reporters do their best work, and, should any fall short, the Board is available to step in and correct the issue and work to ensure it does not happen again.

The Board embraces its consumer protection mission and has worked hard to parlay scarce and limited resources into the most effective operation possible. The Board works hard to balance the multiple consumer interests that would otherwise be left to the entity with the deepest pockets and strongest power, despite a right or wrong position. The current Board members are actively engaged in their policy-setting duties as well as the enforcement matters that rise to their level. The current Board should continue its dedicated oversight of the court reporting industry for the protection of California consumers.

\*\*\*Current Board Response: The court reporting industry continues to embrace technology, creating new twists to the daily practice. The Board acts as a valuable conduit for information to licensees.

More importantly, the Board is available to assist consumers who have issues with court reporting services, including transcript delivery. While attorneys and judges may be accustomed to working with court reporters on a routine, even daily basis, many litigants find themselves dealing with court reporters and transcripts as a new experience. The laws, from billing to transcript delivery, can be confusing, and the Board is frequently called upon to assist these consumers with navigating the industry.

The rapid advances in AI also make it important that the Board be available to both consumers and the industry. The Board has this and other initiatives in its sights, so to speak, as part of its newly developed strategic plan.

The Court Reporters Board may be a comparatively small board, but with appeal rights and due process rights at stake, the importance of the role of a court reporter cannot be overemphasized. Therefore, good oversight by the Board is essential for the consumers of California. The Board ensures the integrity of transcripts and protects consumers from incompetent reporters. The lives and financial well-being of litigants depend on the competence and integrity of court reporters. The Board makes it possible for consumers of the legal system to have confidence that they can rely on the record produced by licensees.

## Section 11 – New Issues

This is the opportunity for the board to inform the Committees of solutions to issues identified by the board and by the Committees. Provide a short discussion of each of the outstanding issues, and the board's recommendation for action that could be taken by the board, by DCA or by the Legislature to resolve these issues (i.e., policy direction, budget changes, legislative changes) for each of the following:

1. Issues raised under prior Sunset Review that have not been addressed.
2. New issues identified by the board in this report.
3. New issues not previously discussed in this report.
4. New issues raised by the Committees.

### **CRB ISSUE No. 1: Growth of Artificial Intelligence (AI)**

Advances in Artificial Intelligence (AI) pose a couple of challenges to the court reporting industry. More people are being exposed to features like auto-captioning in remote meeting platforms. If people are speaking clearly and not too quickly, the captions can be quite accurate. This leads to a perception that automatic speech recognition will replace court reporters, which makes it very difficult to promote the profession.

The reality is that in a state as diverse as California, AI and voice recognition will have limited uses. Between the accents encountered and the speed at which people speak, AI will not be accurate enough to produce a verbatim record.

That same feature, however, is being added to court reporting software to allow the software to offer suggestions of words being heard. The reporter may then accept the translation as accurate or reject the suggestion. Carried out to its full potential, the AI software could possibly be doing 100% of the translation, with a type of monitor approving the transcript as it is created.

This change will have a big impact on consumers who look to the court reporter to be the objective, unbiased person creating the record on which any appeal relies.

It will be important for the Board to stay abreast of changes in technology and updates to court reporting software.

*Legislative Action Needed: [none at this time]*

### **CRB ISSUE No. 2: Remote Reporting**

The practice of reporting remotely is undergoing rapid change. If minimum technical standards for remote proceedings (adequate bandwidth, a reliable internet connection, and appropriate equipment) are met, remote proceedings can be comparable to in-person proceedings. However, if only one of these parameters is not met or fails, even momentarily, capturing the record in remote proceedings becomes problematic and at times impossible for the court reporter.

The Board has received feedback from multiple parties relating diverse experiences with remote reporting. Licensees have related to the Board that they have reported lengthy trials remotely without any problems. Others have reported being unable to hear to produce a record and unable to communicate with the parties after having been muted by the event host.

*Legislative Action Needed: [None at this time.]*

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### **CRB ISSUE No. 3: Digital Monitoring**

There are firms that are using digital recorders to cover deposition proceedings. Digital monitors record the proceedings electronically and are trained to make notes of the proceedings, for instance, to obtain spellings of names or terms of art, as well as to stop speakers from overlapping. The recording is then transcribed by someone else.

There is no oversight of this type of recording. If the attorneys know about it before the commencement of the proceedings and stipulate to it, that's a knowing decision on the part of the consumer. However, if the parties are not informed until the end of the proceeding, if at all, the consumer has been harmed by being misled into assuming a licensed reporter would be reporting and transcribing the proceeding.

To help consumers be aware, the Board, with the help of DCA's Office of Public Affairs, has produced an information piece called "Five Reasons to Use a Licensed Court Reporter." This is included as Attachment L. This was distributed to the State Bar Association as well as posted on the Board's website and social media accounts. Additionally, the Board encourages licensees to state their license number at the beginning of each proceeding in order to alert attorneys as to whether they are receiving the services of a licensee.

*Legislative Action Needed: Because this method of recording has become more prevalent, the Board recommends that the Legislature look at mandating the Board to set standards and oversee the practice of digital monitors.*

*Additionally, legislation requiring a court reporter to state their name and license number on the record before beginning to report a proceeding would serve to further protect consumers from unlicensed activity.*

---

### **CRB ISSUE No. 4: Fiscal Solvency**

It is critical for the Board to be well funded not only to carry out its consumer protection mandate but also to fund the TRF. The Board is approaching the statutory maximum for licensees and is already at the statutory maximum for firm registration. Looking toward the future projections would indicate the statutory caps should be raised.

*Legislative Action Needed: [Statutory licensee cap of \$250 and firm registration cap of \$500 should be increased.]*

---

### **CRB ISSUE No. 5: Captioning Oversight**

Court reporters who provide instantaneous translation of a proceeding for the hearing impaired are called captioners. They are often used in educational settings as well as a variety of social and professional settings from conferences to church services. While there is national certification offered on a voluntary basis, there are no standards or oversight in California. This leaves the consumer vulnerable to poorly skilled practitioners.

The Legislature may look at mandating that the Board set standards and oversee the practice of captioning in California.

*Legislative Action Needed: [None at this time]*

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## **CRB ISSUE No. 6: Workforce Continuity**

The availability of court reporters has historically followed the same labor supply cycle as other industries. There are times when there are ample court reporters, resulting in a very competitive environment and reduced school enrollment. At other times, there are not enough court reporters to cover all of the available work, leading to a more competitive environment and increased school enrollment.

The National Court Reporters Association (NCRA) had predicted a nationwide shortage of court reporters, and some sectors have experienced it. Here in California the shortage was exacerbated in 2010 when the courts stopped providing court reporters for civil matters and eliminated those positions. Because those courtrooms continued to require court reporters, litigants were forced to privately hire court reporters, and the freelance portion of the industry began to cover court work, but at much higher rates and less efficiency.

The creation of a thriving private market for court work has put a strain on the courts' ability to hire court reporters. Courts find it difficult to compete with the private market they helped to create. The Legislature has provided \$30 million in ongoing funding for hiring of court reporters, and, after an initial delay in implementation, the courts are now hiring, offering signing and retention bonuses.

The Board has been proactive on this issue, exploring license reciprocity with Texas, NCRA, and most recently with the National Verbatim Reporters Association (NVRA). Additionally, the Board is considering changing the skills testing format to conform to universal formats to increase pass rates and the licensee pool.

In addition, the Board was successful in getting legislative approval to license voice writers. Voice writing is another method of verbatim reporting, using voice recognition software and a personalized dictionary rather than steno shorthand. The theory behind the methods is similar in that both use shortened abbreviations and specially created arbitrary entries. Steno shorthand is based on a completely different "language" of shorthand abbreviations. Voice writing, on the other hand, is based on English. This makes voice writing easier for students to learn resulting in a shorter training period and a higher completion rate.

Since the Board began licensing voice writers in November of 2022, 16 licenses have been issued and the number of applicants to the license exam has steadily increased.

School enrollment is up for the programs recognized by the Board, some by as much as 83%. While students who complete a training program from a Board-recognized school are eligible to take the license exam, other training programs are available. If a student completes a program by a non-Board-recognized school, they must pass the RPR, CVR, or CVR-S certification before being eligible to take the California license exam. As a direct result of our licensing voice writers, as of January 2023, NVRA is offering its certification test three times per year in California.

The Board continues to work on reciprocity efforts and monitor new technology as it evolves.

*Legislative Action Needed: None at this time.*

## Section 12– Attachments

Please provide the following attachments:

- Board's administrative manual. *See Attachment G*
- Current organizational chart showing relationship of committees to the board and membership of each committee (cf., Section 1, Question 1). *Not Applicable – No Attachment*
- Major studies, if any (cf., Section 1, Question 4). *See Attachment E*
- Year-end organization charts for last four fiscal years. Each chart should include number of staff by classifications assigned to each major program area (licensing, enforcement, administration, etc.) (cf., Section 2, Question 15). *See Attachment B*
- Provide each quarterly and annual performance measure report for the board as published on the DCA website. *See Attachment F*

### **List of attachments:**

- A. School List
- B. Organization Charts
- C. Best Practice Pointers
- D. Strategic Plan 2019 – 2023
- E. Occupational Analysis Validation Report
- F. Performance Measures
- G. Administrative Manual
- H. Application for Examination
- I. Application for Reexamination
- J. Pass Rates by School
- K. Complaint Prioritization Guidelines
- L. Five Reasons to Use a Licensed Court Reporter

## COURT REPORTERS BOARD OF CALIFORNIA

## Recognized Reporter Training Schools

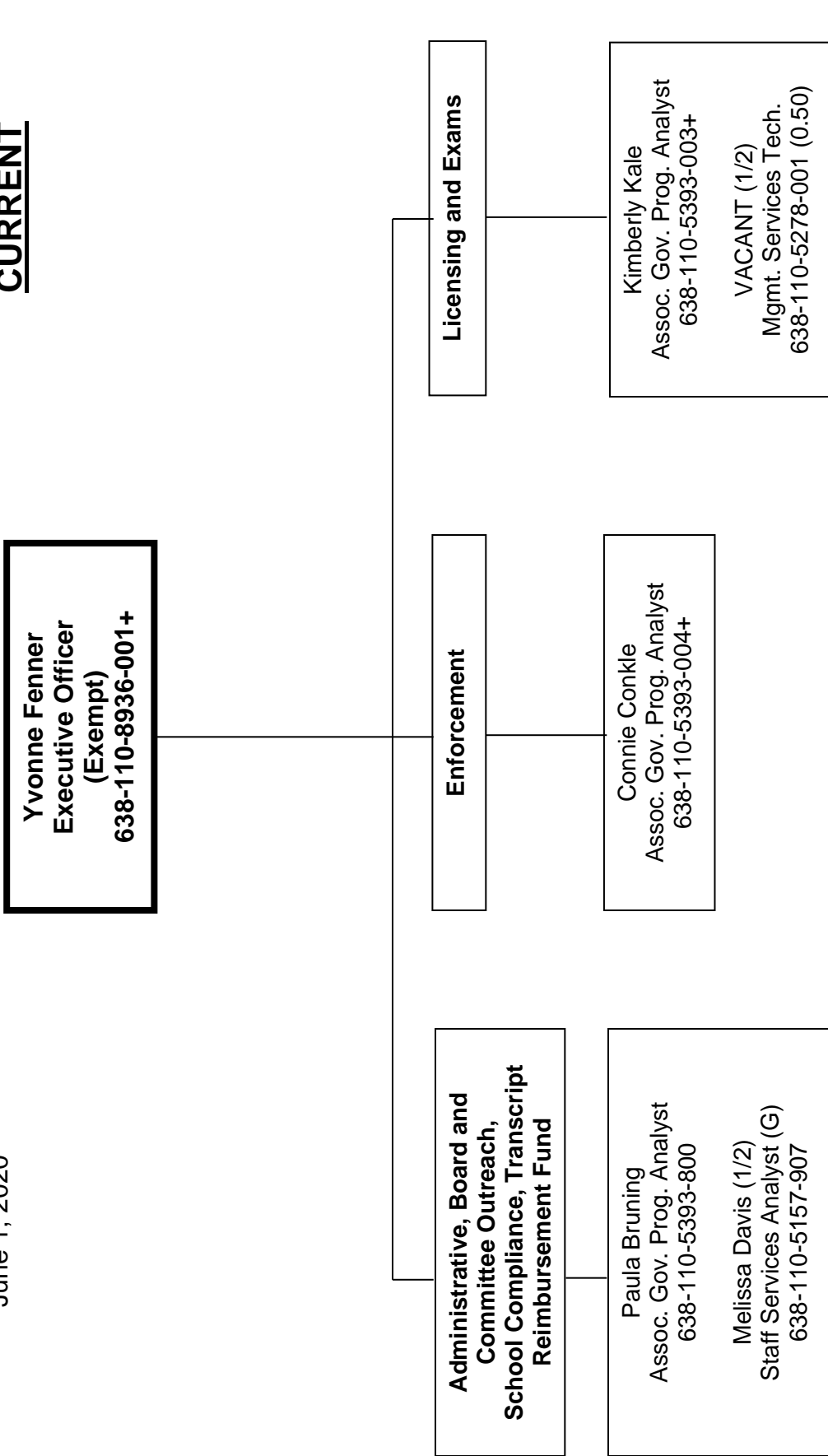
<b>College of Marin/Indian Valley Campus</b> <b>1800 Ignacio Boulevard</b> <b>Novato, CA 94949</b>	<b>www.marin.edu</b> <b>(415) 457-8811, ext. 8232</b> <b>Christine Leung</b> <b>cleung@marin.edu</b>
<b>Cypress College Court Reporting</b> <b>9200 Valley View</b> <b>Cypress, CA 90630</b>	<b>www.cypresscollege.edu</b> <b>(714) 484-7211</b> <b>Carolee Freer</b> <b>cfreer@cypresscollege.edu</b>
<b>Downey Adult School/CRP</b> <b>12340 Woodruff Avenue</b> <b>Downey, CA 90241</b>	<b>www.das.edu/court-reporting/</b> <b>(562) 413-0231</b> <b>Jocelyn Epperson</b> <b>jepperson@dusd.net</b>
<b>Taft College Court Reporting</b> <b>at WESTEC campus</b> <b>5801 East Lerdo Highway</b> <b>Shafter, CA 93263</b>	<b>www.taftcollege.edu</b> <b>(661) 387-1055, ext. 215</b> <b>Lisa McDonnell – lmcdonnell7740@gmail.com</b> <b>Lisa Porter – lisabwestec@gmail.com</b>
<b>Tri Community Adult Education</b> <b>231 East Stephanie Drive</b> <b>Covina, CA 91722</b>	<b>www.c-vusd.org/domain/469</b> <b>(562) 243-0362</b> <b>Carrie Ravenscroft</b> <b>cravenscroft@c-vusd.org</b>
<b>West Valley Community College</b> <b>Court Reporting Program</b> <b>14000 Fruitvale Avenue</b> <b>Saratoga, CA 95070</b>	<b>www.westvalley.edu</b> <b>(408) 741-2559</b> <b>Margarita Ortiz</b> <b>margaret.ortiz@wvm.edu</b>
<b>Humphreys College</b> <b>6650 Inglewood Avenue</b> <b>Stockton, CA 95207</b>	<b>www.humphreys.edu</b> <b>(209) 235-2941</b> <b>Pamela Closs</b> <b>pamela.closs@humphreys.edu</b>
<b>South Coast College</b> <b>2011 West Chapman Avenue</b> <b>Orange, CA 92868</b>	<b>www.southcoastcollege.com</b> <b>(714) 867-5009</b> <b>Yolanda Krieger</b> <b>ykrieger@southcoastcollege.com</b>

FY 2019-20  
 Authorized Positions: 4.5  
 Temporary Help Positions: .5

Department of Consumer Affairs  
**Court Reporters Board of California**

June 1, 2020

**CURRENT**



Yvonne Fenner, Executive Officer

Personnel Analyst

Date

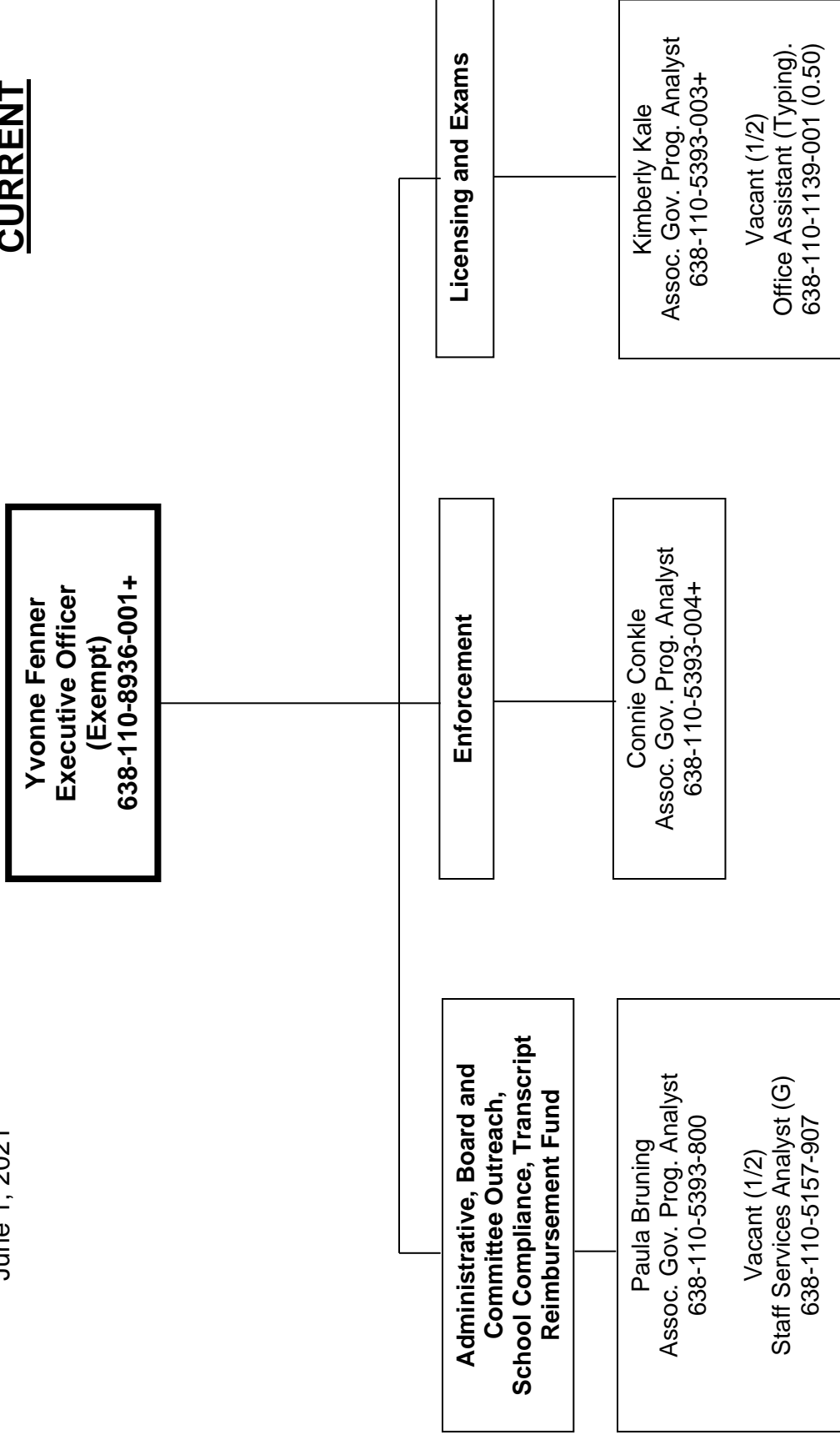
+ CORI Position

FY 2021-22  
 Authorized Positions: 4.5  
 Blanket Positions: .5

Department of Consumer Affairs  
**Court Reporters Board of California**

June 1, 2021

**CURRENT**



Yvonne Fenner, Executive Officer

Date

Personnel Analyst

Date

FY 2021-22  
 Authorized Positions: 4.5  
 Blanket Positions: .5

Department of Consumer Affairs  
**Court Reporters Board of California**

June 1, 2022

**CURRENT**

**Yvonne Fenner  
 Executive Officer  
 (Exempt)  
 638-110-8936-001+**

**Administrative, Board and  
 Committee Outreach,  
 School Compliance, Transcript  
 Reimbursement Fund**

Paula Bruning  
 Assoc. Gov. Prog. Analyst  
 638-110-5393-800  
 Vacant (1/2)  
 Staff Services Analyst (G)  
 638-110-5157-907

**Enforcement**

Connie Conkle  
 Assoc. Gov. Prog. Analyst  
 638-110-5393-004+

**Licensing and Exams**

Kimberly Kale  
 Assoc. Gov. Prog. Analyst  
 638-110-5393-003+  
 Elaina Zelnik-Padilla (1/2)  
 Office Assistant (Typing).  
 638-110-1139-001 (0.50)

Yvonne Fenner, Executive Officer

Date

Personnel Analyst

Date

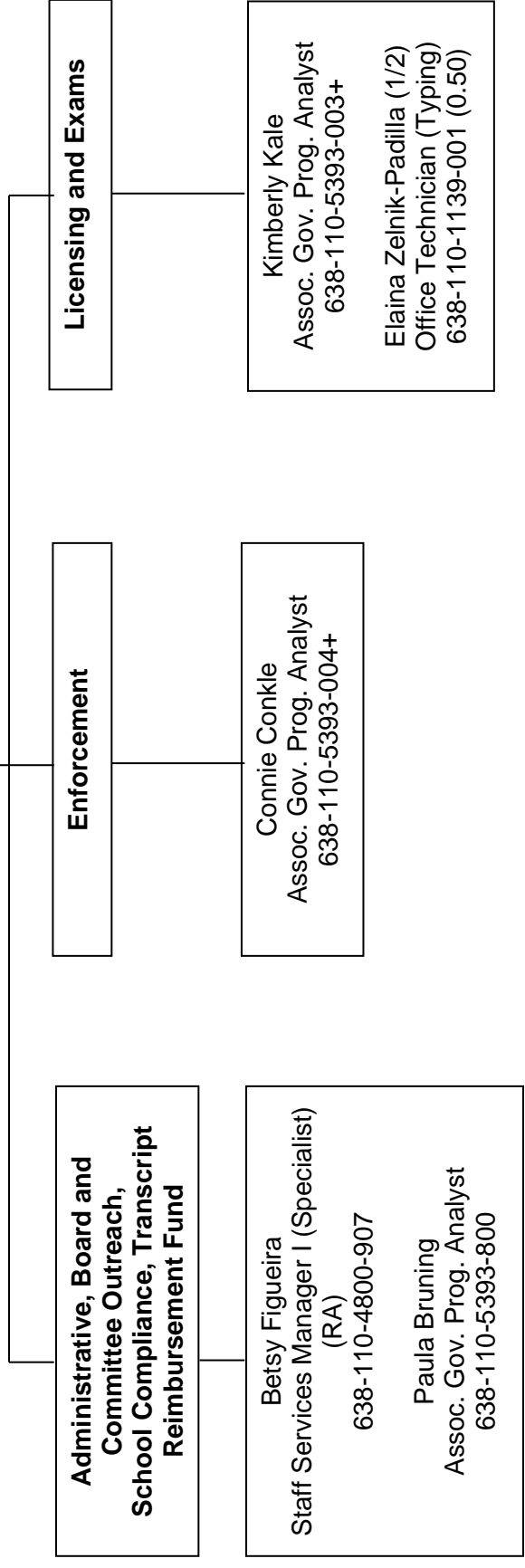
FY 2022-23  
 Authorized Positions: 4.5  
 Blanket Positions: 1

Department of Consumer Affairs  
**Court Reporters Board of California**

June 1, 2023

**CURRENT**

**Yvonne Fenner  
 Executive Officer  
 (Exempt)  
 638-110-8936-001+**



Yvonne Fenner, Executive Officer	Date	Personnel Analyst	Date



# COURT REPORTERS BOARD OF CALIFORNIA



## Best Practice Pointer No. 11 Videoconference/Remote Reporting

With the increase in remote reporting, the Board would like to make licensees aware of the following best practices:

**PLEASE NOTE: Any suggestions regarding paper face masks, face shields, etc., should be considered in connection with your county's current public health order.**

### A. LOGISTICAL ISSUES:

- Encourage counsel to be on camera.
- Reporter should be on camera, if possible. Request counsel to add you to their gallery/grid view to aid in communicating to counsel when there are issues.
- Gallery/grid view is preferred over speaker view.
- Request remote participants not use a mask if safe to do so. If a mask is required for safety, a paper mask is preferred. Consider the use of a face shield as an option.
- Turn off multiple microphones to avoid feedback issues.
- Request participants use no virtual background.
- Use of term "virtual" is discouraged as it may imply "simulated." Preferred practice is use of "videoconference" or "remote."

### B. REPORTING PROCEEDINGS:

Reporters are reminded they are the guardian of the record and their responsibilities with regard to the record do not change while reporting a remote proceeding.

- Interrupt as needed to protect the record (see Best Practice Pointer No. 1). The use of "inaudible" is for use in a transcript only where a court reporter did not report the proceedings.
- Create a one-stroke brief for inclusion of a parenthetical such as "(Reporter interrupted for clarification of the record.);" and interrupt as much as needed for an accurate record.
- Ask for identification of everyone for the appearance page. What is obvious when participants are all in the same room can be misleading via a remote platform.

### C. TRANSCRIPT PRODUCTION:

- The transcript should clearly indicate that the proceeding was held on a remote platform (i.e., via videoconference).
- It is appropriate to include a "technical difficulty" parenthetical when that issue interrupts the proceedings or a "failure of transmission" parenthetical.
- Lack of speaker identification should be noted, although all efforts should be made to obtain speaker identification. Recommend inclusion of parenthetical such as "(Reporter interrupted to request speaker identification.);" Use "UNIDENTIFIED SPEAKER" as speaker.
- There is no "modified" or "partial" certification page allowed.



# BEST PRACTICE POINTER Videoconference/Remote Reporting

## D. RECORDING CONSIDERATIONS:

- **Depositions**—Reporters should be aware of increased ability for surreptitious recording of the deposition. Before going on the record, reporters may want to remind participants that, unless included in the notice of deposition or with the consent of all parties, audio or video recording is not permissible.
- **Court**—Courtroom proceedings may not be recorded without the express permission of the Court.

## CONSIDERATIONS FOR POST-COVID-19 IN-PERSON PROCEEDINGS:

- Face masks may make it more difficult to hear. Suggest using paper masks and have supply to offer.
- Use physical distancing.
- Consider using plexiglass shields.
- Do not share objects (pens, papers, supplies).
- Sanitize equipment between jobs.
- Wash hands frequently.

On September 18, 2020, Governor Newsom signed SB 1146 (Umberg) making the following amendment to the Code of Civil Procedure effective immediately:

### 2025.310.

- (a) At the election of the deponent or the deposing party, the deposition officer may attend the deposition at a different location than the deponent via remote means. A deponent is not required to be physically present with the deposition officer when being sworn in at the time of the deposition.
- (b) Subject to Section 2025.420, any party or attorney of record may, but is not required to, be physically present at the deposition at the location of the deponent.
- (c) The procedures to implement this section shall be established by court order in the specific action or proceeding or by the California Rules of Court.
- (d) An exercise of the authority granted by subdivision (a) or (b) does not waive any other provision of this title, including, but not limited to, provisions regarding the time, place, or manner in which a deposition shall be conducted.
- (e) This section does not alter or amend who may lawfully serve as a deposition officer pursuant to this title or who otherwise may administer oaths pursuant to sections 2093 and 2094 of this code or section 8201 of the Government Code.

*Best practice pointers are not regulations or statutorily mandated. They are a way for the Board to provide guidance on situations not expressly set out in statute or regulation. Although the pointers may be used by licensees as a guide, the Board will not use them as a basis for discipline or enforcement of any type.*



**COURT REPORTERS BOARD**  
OF CALIFORNIA

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[www.courtreportersboard.ca.gov](http://www.courtreportersboard.ca.gov)





Attachment D



# Court Reporters Board Strategic Plan

2019 – 2023



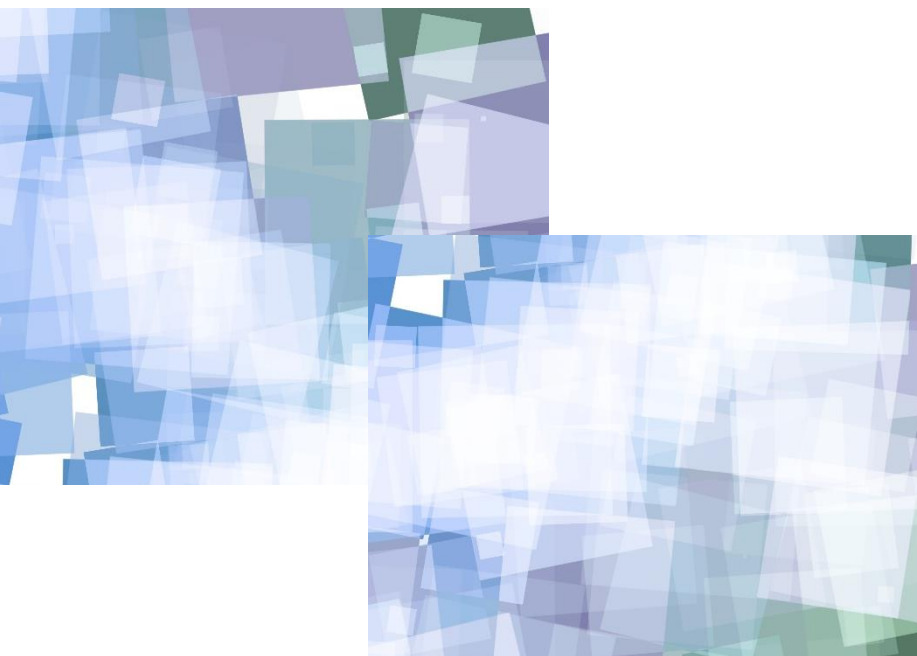
SOLID Planning Solutions  
Department of Consumer Affairs

Adopted: February 4, 2019



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## Court Reporters Board of California Members

Davina Hurt, Esq., Public Member, Board Chair

Toni O’Neill, Licensed Member, Vice Chair

Elizabeth Lasensky, Public Member

Carrie Nocella, Esq., Public Member

*Vacancy – Licensed Member*



Gavin Newsom, Governor

Alexis Podesta, Secretary, Business, Consumer Services, and Housing Agency

Dean R. Grafilo, Director, Department of Consumer Affairs

Yvonne Fenner, Executive Officer, Court Reporters Board

## Message from the Board Chair

The Court Reporters Board (CRB) is pleased to present the latest edition of its strategic plan for FY 2019-2022. The following pages detail the hard work and careful attention of the CRB, guided by the executive officer, Yvonne Fenner. Working with internal and external stakeholders, strategic initiatives were outlined for the coming five years in consumer protection of California court reporting. Our goal is to protect the integrity of the transcript, from creation to delivery.

This roadmap will continue the development and success of previous plans. The guideposts for progress are professional qualifications, enforcement, educational oversight, consumer information, and organizational effectiveness. With the helpful guidance of the SOLID facilitators, the CRB was able to identify the most critical tasks under these guideposts to continue fulfillment of its consumer protection mission of protecting the public by ensuring the integrity of the judicial record while maintaining the standard of competency through oversight of the court reporting profession. Setting out these specific goals will aid in measuring our success over time as we work toward setting and maintaining the standards for court reporting, the keystone to a fair judicial system.

Under the previous strategic plan 2015-2018, the Board has made significant progress and will build upon our accomplishments. As the court reporting industry continues to adapt to technology developments, the CRB works to ensure consumers have access to highly trained professionals entering the workforce.

We look forward and are steadfast in maintaining a strong presence on behalf of consumers as we face the challenges of a rapidly changing future. This strategic plan is intended to be a living document, providing a continuing touchstone for the staff yet flexible enough to change as the board faces the external environment and the emergence of new opportunities or conflicts. It is an exciting time to be a part of court reporting. I am honored to continue my leadership and serve as a bridge for knowledge and collaboration. Together, this ambitious proactive plan will have positive impacts for many years to come.



Davina Hurt, Board Chair

## About the Board

The Court Reporters Board was established in 1951 by an act of the Legislature. The Board's mandate is to protect the consumers of the state. It does that by: 1) administering a minimum level competency test to determine entry level abilities, 2) regulating the minimum curriculum which court reporting schools and programs must offer, and 3) disciplining licensees when necessary. In addition, the Board administers the Transcript Reimbursement Fund (TRF) which reimburses CSRs for providing transcripts to indigent civil litigants. All the Board's activities, including the TRF, are funded from licensing and examination fees. Thus, the Board is considered a "special fund" or self-funded agency, because no tax dollars from the General Fund support the Board.

The Board is composed of three public members and two licensees. The Governor appoints one public member and two licensees to the Board. The Speaker of the Assembly and the Senate Rules Committee each appoint one public member. All Board members serve staggered, four-year terms.

Since its inception, the Board has licensed 14,308 people. Of those, approximately 6,500 have current licenses. In the profession, licensees are known as either "officials" who work in court, or "freelance" who work through court reporting agencies and report mostly depositions.

Our only office exists in Sacramento. There is an executive officer and a staff of three full-time employees and two part-time. There is an enforcement analyst, an exam/licensing analyst, a TRF Pro Bono Program/school compliance analyst, a TRF Pro Per Program analyst, and a receptionist for the Board.



## Accomplishments from 2015 – 2018 Strategic Plan

As a part of strategic planning, the Court Reporters Board reviewed its previous strategic plan goals and identified which objectives were accomplished. The following are among the significant Board accomplishments since the 2015-2018 strategic plan was adopted:

**Enforcement:** The Board sponsored AB 2082 (Kalra), which was chaptered September 21, 2018. Specifically, this law prohibits any entity providing court reporting services, including non-licensee-owned firms, from requesting compensation for a transcript that is not in compliance with the minimum transcript format standards, requesting compensation for a certified court transcript using fees not set in statute, providing a transcript in advance to one party over another, or failing to notify a party of a request to prepare any portion of a transcript including rough drafts and expedites. A violation is punishable by civil fine not to exceed \$10,000 per violation.

**Examination:** The Board conducted an occupational analysis with the assistance of the Office of Professional Examination Services (OPES), the purpose of which is to define the profession for CSRs in terms of actual job tasks that new licensees must be able to perform competently at the time of licensure and in terms of the knowledge necessary to perform those tasks. The information gathered via the occupational analysis process allows the Board to ensure the license examinations are relevant to the actual job skills and knowledge needed for a candidate passing the license examination to be minimally competent to practice.

In addition to the traditional occupational analysis, the Board worked with OPES to conduct a speed survey of working reporters to learn how fast entry-level court reporters need to be to be minimally competent. The results of the survey supported continuing to test at the current requirement of 200 words per minute for the skills portion of the license exam.

**Consumer Information and Outreach:** Board staff worked with DCA's Office of Public Affairs to develop a communications plan. The plan incorporates the goals of educating stakeholders on the Board's services, standards, and complaint process, as well as supporting schools' recruitment efforts to preserve the integrity and continuity of the court reporter workforce for consumer protection.

**Practice Standards:** To further its mission to protect the consumer, the Board approved and published 10 best practices pointers for use by licensees. The practice pointers are not regulations or statutorily mandated but rather designed to help educate licensees on various areas of practice.



## Mission

To protect the public by ensuring the integrity of the judicial record and maintaining the standard of competency through oversight of the court reporting profession.

## Vision

Consumers hiring a California licensed court reporter engage the highest quality, most knowledgeable, and ethical professional.

## Values

### **CONSUMER PROTECTION**

We make effective and informed decisions in the best interest and for the safety of Californians.

### **EXCELLENCE**

We have a passion for quality and strive for continuous improvement of our programs, services, and processes through employee empowerment and professional development.

### **INTEGRITY**

We are committed to honesty, ethical conduct, and responsibility.

### **SERVICE**

We are professional and responsive to the needs of our stakeholders.

### **COLLABORATION**

We value partnerships. We foster the public's trust through open communication and work in a cooperative, respectful, and courteous manner.



# Strategic Goals

## Goal 1: Professional Qualifications

*The Board promotes the professional qualifications of those practicing court reporting by establishing examination standards and requirements.*

- 1.1 Maintain fair testing to provide consumers with competent entry-level reporters.
- 1.2 Expand Best Practice Pointers to keep licensees up-to-date with industry standards.
- 1.3 Facilitate expansion of verbatim reporting methods to provide a sufficient workforce.
- 1.4 Investigate real-time captioning standards and assess industry practices for consumer protection.

## Goal 2: Enforcement

*The Board protects consumers by preventing violations and effectively enforcing laws, codes, and standards when violations occur.*

- 2.1 Monitor compliance by non-licensee-owned firms to ensure integrity of the record.
- 2.2 Inform licensees regarding the role of the Board's enforcement to dispel common misconceptions.
- 2.3 Educate consumers about the Board's complaint process to have a place for recourse in cases of violation.

## Goal 3: Educational Oversight

*The Board advances higher education standards through educational oversight to increase the quality of education and safeguard consumer protection.*

- 3.1 Support schools' recruitment efforts to preserve the integrity and continuity of the workforce.
- 3.2 Increase Court Reporters Board school visits to more effectively monitor compliance with applicable laws and regulations.



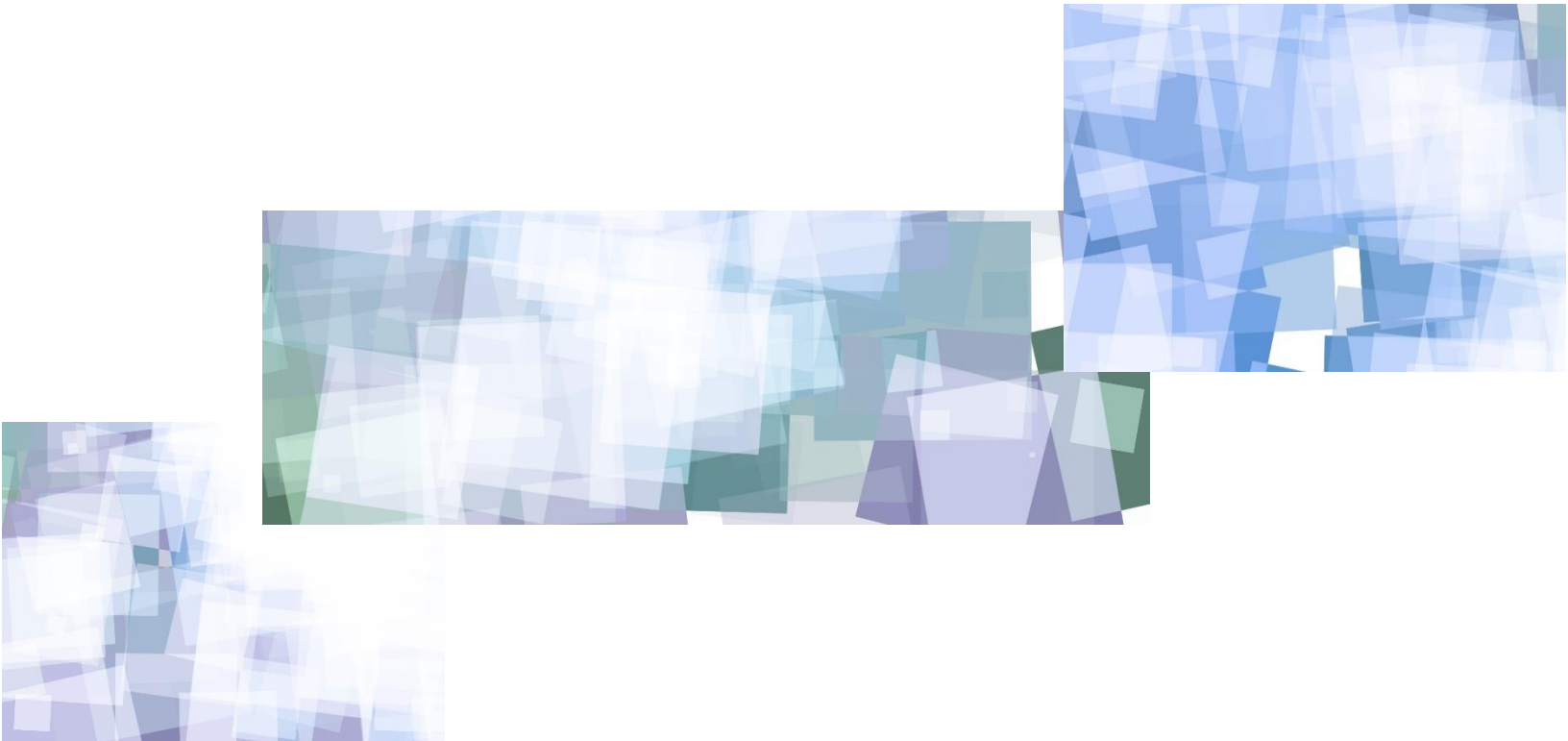
## Goal 4: Consumer Information

*The Board increases public and professional awareness of its mission, activities, and services, with a focus on practice standards.*

- 4.1 Launch a strategic awareness campaign in collaboration with external stakeholders to educate consumers about the court reporting roles and CRB responsibilities and services.

## Goal 5: Organizational Effectiveness

*The Board enhances organizational effectiveness and strives to improve the quality of customer service.*

- 5.1 Improve the CRB website to improve service and efficiency for consumers.
  - 5.2 Implement business modernization to allow online renewals and applications.
  - 5.3 Continue to cross-train staff to be effective and efficient, as well as to prepare for succession planning.
- 



Prepared by SOLID Planning Solutions,  
Department of Consumer Affairs, for  
Court Reporters Board  
2535 Capitol Oaks Drive, Suite 230  
Sacramento, CA 95833  
September 17, 2018

*This strategic plan is based on stakeholder information and discussions facilitated  
by SOLID for the Court Reporters Board from June 2018 to September 2018.  
Subsequent amendments may have been made after Board adoption of this plan.*



**COURT REPORTERS BOARD**  
OF CALIFORNIA





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OF CALIFORNIA

OCCUPATIONAL ANALYSIS OF THE  
CERTIFIED SHORTHAND REPORTER PROFESSION





COURT REPORTERS BOARD OF CALIFORNIA

# OCCUPATIONAL ANALYSIS OF THE CERTIFIED SHORTHAND REPORTER PROFESSION



May 2023



**OFFICE OF PROFESIONAL EXAMINATION SERVICES**

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This occupational analysis report is mandated by California Business and Professions Code (BPC) § 139 and by DCA Licensure Examination Validation Policy OPES 22-01.

## EXECUTIVE SUMMARY

The Court Reporters Board of California (Board) requested that the Department of Consumer Affairs' Office of Professional Examination Services (OPES) conduct an occupational analysis (OA) of the certified shorthand reporter (CSR) profession in California. The purpose of this OA is to define practice for CSRs in terms of the critical tasks that CSRs must be able to perform safely and competently at the time of licensure. The results of this OA provide a description of practice for the CSR profession and provide the basis for developing valid and legally defensible California Certified Shorthand Reporter Licensure Examinations.

OPES test specialists began by researching the profession and conducting telephone interviews with licensed CSRs working in locations throughout California. The purpose of these interviews was to identify the tasks performed by CSRs and to determine the knowledge required to perform those tasks safely and competently. Using the information gathered from the research and the interviews, OPES test specialists developed a preliminary list of tasks performed by CSRs in their profession, and a list of statements representing the knowledge needed to perform those tasks.

In September 2022, OPES test specialists convened a workshop to review and refine the preliminary lists of tasks and knowledge statements describing CSR practice in California. CSRs participated in the workshops as subject matter experts (SMEs). The SMEs were from diverse backgrounds in the profession (e.g., work setting, geographic location of practice, years licensed). Later in September 2022, OPES test specialists convened a second workshop to review and finalize the lists of tasks and knowledge statements. The SMEs also linked tasks with the knowledge required to perform those tasks and reviewed the demographic questions to be used on the OA questionnaire.

After the second workshop, OPES test specialists developed a three-part OA questionnaire to be completed by CSRs statewide. Development of the OA questionnaire included a pilot study that was conducted with SMEs who participated in either the interviews or the September 2022 workshops. The pilot study participants' feedback was incorporated into the final questionnaire, which was administered from November 9, 2022–January 6, 2023.



In the first part of the OA questionnaire, CSRs were asked to provide demographic information related to their practice and work settings. In the second part, CSRs were asked to rate how often they perform each task in their current practice (Frequency) and how important the task is to effective performance of their current practice (Importance). In the third part, CSRs were asked to rate how important each knowledge statement is to effective performance of their current practice (Importance).

In November 2022, OPES developed a stratified random sample of 2,044 licensees (out of 6,978 total licensees) to participate in the OA questionnaire. The sample was stratified by years licensed and county of practice, with oversampling of CSRs licensed 0–5 years and CSRs working in counties with fewer than 10 licensees. The Board sent letters to the sample of 2,044 CSRs, inviting them to complete the online questionnaire.

In December 2022, OPES developed a second sample of 1,000 licensees for a total of 3,044 invitation letters sent. Fifty-nine invitation letters were returned. The final number of invitation letters sent was 2,985.

A total of 373 CSRs, or approximately 12.5% of the CSRs in the two samples, responded by accessing the OA questionnaire. The final sample included in the data analysis was 312 (10.5%). This response rate reflects two adjustments. First, OPES excluded data from respondents who indicated that they were not currently licensed and working as a CSR in California. Second, OPES excluded questionnaires containing a large portion of incomplete responses.

OPES test specialists then performed data analyses on the tasks and knowledge statement ratings obtained from the questionnaire respondents. The task importance and frequency ratings were combined to derive an overall criticality index for each task. The mean importance rating was used as the criticality index for each knowledge statement.

After the data were analyzed, OPES test specialists conducted two workshops with SMEs, one in January and one in February 2023. The SMEs evaluated the criticality indices and determined whether any tasks or knowledge statements should be eliminated. The SMEs also established the final linkage between tasks and knowledge statements, reviewed the task and knowledge statement content areas, and defined those content areas. The SMEs then evaluated the preliminary content area weights and determined the final weights for the three

new examination outlines for the California Certified Shorthand Reporter Licensure Examinations: English, Professional Practice, and Dictation.

The new examination outline for the English Examination is a single content area; three subareas are weighted by criticality relative to the other subareas. The new examination outlines for the Professional Practice and Dictation Examinations are each structured into four content areas, which are weighted relative to the other content areas. The new outlines identify the tasks and knowledge critical to competent CSR practice in California at the time of licensure.

The examination outlines developed as a result of this OA provide the basis for developing the California Certified Shorthand Reporter Licensure Examinations.

OVERVIEW OF THE EXAMINATION OUTLINE FOR CALIFORNIA CERTIFIED  
SHORTHAND REPORTER LICENSURE EXAMINATION: ENGLISH

<b>Content Area</b>	<b>Description</b>	<b>Area Percent Weight</b>	<b>Subarea Percent Weight</b>
RESEARCH AND LANGUAGE SKILLS	This area assesses a candidate's ability to follow current rules of punctuation, grammar, word usage, and vocabulary to ensure accuracy of the transcript.	100	
1. Grammar			15
2. Proofreading			65
3. Vocabulary			20
TOTAL		100	

OVERVIEW OF THE EXAMINATION OUTLINE FOR THE CALIFORNIA CERTIFIED  
 SHORTHAND REPORTER LICENSURE EXAMINATION: PROFESSIONAL PRACTICE

<b>Content Area</b>	<b>Description</b>	<b>Percent Weight</b>
1. REPORTING PROCEEDINGS	This area assesses the candidate's knowledge of procedures for gathering information using stenographic or voice-writing equipment and computer-aided transcription software according to laws, regulations, and CRB Best Practices to create a verbatim record.	32
2. TRANSCRIBING PROCEEDINGS	This area assesses the candidate's ability to prepare and create an accurate certified transcript from the stenographic or voice record in a format that conforms to laws, regulations, and CRB Best Practices.	26
3. TRANSCRIPT MANAGEMENT	This area assesses the candidate's knowledge of laws, regulations, and CRB Best Practices pertaining to the preparation, sale, notification, delivery, and maintenance of records, transcripts, and exhibits.	25
4. ETHICS	This area assesses the candidate's ability to adhere to laws, regulations, and CRB Best Practices pertaining to professional and ethical conduct.	17
<b>TOTAL</b>		<b>100</b>

OVERVIEW OF THE EXAMINATION OUTLINE FOR THE CALIFORNIA CERTIFIED  
 SHORTHAND REPORTER LICENSURE EXAMINATION: DICTATION

<b>Content Area</b>	<b>Description</b>	<b>Percent Weight</b>
1. REPORTING PROCEEDINGS	This area assesses the candidate's ability to utilize stenographic or voice-writing equipment and computer-aided transcription software to create a verbatim record.	39
2. TRANSCRIBING PROCEEDINGS	This area assesses the candidate's ability to prepare and create an accurate transcript from the stenographic or voice record formatted to applicable standards.	13
3. RESEARCH AND LANGUAGE SKILLS	This area assesses the candidate's ability to follow current rules of punctuation, grammar, word usage, and vocabulary when preparing the transcript.	41
4. TRANSCRIPT MANAGEMENT	This area assesses the candidate's ability to prepare and deliver the transcript in a timely manner.	7
TOTAL		100

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## CHAPTER 1 | INTRODUCTION

### PURPOSE OF THE OCCUPATIONAL ANALYSIS

The Court Reporters Board of California (Board) requested that the Department of Consumer Affairs' Office of Professional Examination Services (OPES) conduct an occupational analysis (OA) as part of the Board's comprehensive review of the certified shorthand reporter (CSR) profession in California. The purpose of the OA is to identify critical activities performed by CSRs in California. The results of this OA provide a description of practice for the CSR profession and a basis for developing valid and legally defensible California Certified Shorthand Reporter Licensure Examinations.

### PARTICIPATION OF SUBJECT MATTER EXPERTS

California CSRs participated as subject matter experts (SMEs) during the OA to ensure that the description of practice directly reflects current CSR practice in California. These SMEs represented the profession in terms of work setting, geographic location of practice, and years licensed. The SMEs provided technical expertise and information regarding different aspects of CSR practice through interviews and workshops. During the interviews, the SMEs provided information about the tasks involved in practice and the knowledge required to perform those tasks safely and competently. During the workshops, the SMEs developed and reviewed the tasks and knowledge statements describing CSR practice, organized the tasks and knowledge statements into content areas, evaluated the responses to the OA questionnaire, and developed the examination outlines.

### ADHERENCE TO LEGAL STANDARDS AND GUIDELINES

Licensure, certification, and registration programs in the State of California adhere strictly to federal and state laws and regulations, and to professional guidelines and technical standards. For the purposes of OAs, the following laws and guidelines are authoritative:

- California Business and Professions Code (BPC) § 139.
- 29 Code of Federal Regulations Part 1607 – Uniform Guidelines on Employee Selection Procedures (1978).

- California Fair Employment and Housing Act, Government Code § 12944.
- *Principles for the Validation and Use of Personnel Selection Procedures* (2018), Society for Industrial and Organizational Psychology (SIOP).
- *Standards for Educational and Psychological Testing* (2014), American Educational Research Association, American Psychological Association, and National Council on Measurement in Education.

For a licensure program to meet these standards, it must be solidly based upon the job activities required for practice.

## DESCRIPTION OF OCCUPATION

The CSR occupation is described as follows in BPC §§ 8017, 8017.5, and 8018:

### § 8017

The practice of shorthand reporting is defined as the making, by means of written symbols or abbreviations in shorthand or machine shorthand writing, or by voice writing, of a verbatim record of any oral court proceeding, deposition, court ordered hearing or arbitration, or proceeding before any grand jury, referee, or court commissioner and the accurate transcription thereof.

### § 8017.5

For purposes of this article:

(a) "Voice writer" means a certified shorthand reporter that makes a verbatim record or a proceeding using a closed microphone voice dictation silencer, steno mask, or similar device using oral shorthand and voice notes.

(b) "Voice writing" means a verbatim record or a proceeding using a closed microphone voice dictation silencer, steno mask, or similar device using oral shorthand and voice notes made by a certified shorthand reporter.

The CSR occupation is described as follows in title 16 § 2403, of the CCR:

Title 16 of the California Code of Regulations

Division 24. Court Reporters Board of California

Article 1. General Provisions

## §2403. Scope of Practice

The accurate transcription thereof includes, but is not limited to:

(a) In superior court

(1) Taking down in shorthand all testimony, objections made, rulings of the court, exceptions taken, arraignments, pleas, sentences, arguments of the attorneys to the jury and statements and remarks made and oral instructions given by the judge or other judicial official.

(2) Writing the transcript out, or the specific portions thereof as may be requested, in plain and legible longhand, or by typewriter, or other printing machine.

(3) Certifying that the transcripts were correctly reported and transcribed.

(4) Filing the transcripts with the clerk of the court when directed by the court.

(5) Making and preparing original transcription on paper.

(6) Delivering a copy of the original transcript in a computer-readable form in standard ASCII code, unless otherwise agreed by the reporter and the court, party, or other person requesting the transcript.

(7) Labeling disks of transcriptions with the case name and court number, the dates of proceedings contained on the disk, and the page and volume numbers of the data contained on the disk and with each disk containing the identical volume divisions, pagination, line numbering, and text of the certified original paper transcript or any portion thereof and sequentially numbered within the series of disks.

(8) Retaining original stenographic notes for the statutorily-required period, or delivery thereof to the court when required by local rule.

(b) For a deposition

(1) Administering the oath or affirmation to the deponent.

(2) Making a full or partial copy of transcription available.

(3) Notifying all parties who attended a deposition of requests for expedited delivery made by other parties for either an original or copy of the transcript, or any portion thereof.

- (4) Recording testimony by stenographic means and retaining stenographic notes of depositions for statutorily mandated period of time.
- (5) Sending written notice to deponent and to all parties attending the deposition when the original transcript of the testimony for each session of the deposition is available for reading, correcting and signing.
- (6) Indicating on the original of the transcript, if the deponent has not already done so at the office of the shorthand reporter, any action taken by the deponent and indicate on the original of the transcript the deponent's approval of, or failure or refusal to approve, the transcript.
- (7) Sending written notification to the parties attending the deposition of any changes which the deponent timely made in person.
- (8) Certifying on the transcript that the deponent was duly sworn and that the transcript or recording is a true record of the testimony given.
- (9) Securely sealing the transcript in an envelope or package endorsed with the title of the action and marked: "Deposition of (here insert name of deponent)," and promptly transmitting it to the attorney for the party who noticed the deposition.
- (10) If the reporter still has a copy, making a transcript of a deposition testimony available to any party requesting a copy, on payment of a reasonable charge.

## CHAPTER 2 | OCCUPATIONAL ANALYSIS QUESTIONNAIRE

### SUBJECT MATTER EXPERT INTERVIEWS

The Board provided OPES with a list of CSR SMEs to contact for telephone interviews. During the semi-structured interviews, 11 SMEs were asked to identify the major content areas of their practice and the tasks performed in each area. They were also asked to identify the knowledge necessary to perform each task safely and competently.

### TASKS AND KNOWLEDGE STATEMENTS

To develop a preliminary list of tasks and knowledge statements, OPES test specialists integrated the information gathered from literature reviews of profession-related sources (e.g., previous OA reports, articles, industry publications, laws and regulations) and from interviews with CSRs.

In September 2022, OPES test specialists facilitated two workshops to review and refine the tasks and knowledge statements. Nine CSRs, from diverse backgrounds (e.g., work setting, geographic location of practice, years licensed), served as SMEs in these workshops. During the first workshop, the SMEs evaluated the tasks and the knowledge statements for technical accuracy, level of specificity, and comprehensiveness. In addition, the SMEs evaluated the organization of tasks within content areas to ensure that the content areas were independent and non-overlapping.

During the second workshop, the SMEs finalized the tasks and the knowledge statements and performed a linkage between them. The linkage was designed to identify the knowledge required for performance of each task and to verify that each statement of knowledge is important for safe and competent practice as a CSR. Additionally, the linkage ensured that all tasks were linked to at least one knowledge statement and that each knowledge statement was linked to at least one task.

During this workshop, SMEs evaluated the scales that would be used for rating tasks and knowledge statements in an online OA questionnaire that would be sent to CSRs statewide. The SMEs also reviewed and revised the proposed demographic questions for the online OA questionnaire.

OPES used the final lists of tasks and knowledge statements, demographic questions, and rating scales to develop the online OA questionnaire.

## QUESTIONNAIRE DEVELOPMENT

OPES test specialists developed the online OA questionnaire designed to solicit CSRs' ratings of the tasks and knowledge statements. The surveyed CSRs were instructed to rate how often they perform each task in their current practice (Frequency) and how important each task is to the effective performance of their current practice (Importance). In addition, they were instructed to rate how important each item of knowledge is to the effective performance of their current practice (Importance). The OA questionnaire also included a demographic section to obtain relevant professional background information about responding CSRs. The OA questionnaire is Appendix E.

## PILOT STUDY

Before administering the final questionnaire, OPES conducted a pilot study of the online questionnaire. The draft questionnaire was reviewed by the Board and then sent to 14 SMEs who had participated in either the interviews or the workshops. OPES received feedback on the pilot study from all 14 SMEs. The SMEs reviewed the tasks and knowledge statements in the questionnaire for technical accuracy and for whether they reflected CSR practice. The SMEs also provided the estimated time for completion of the questionnaire and information about online navigation and ease of use. OPES test specialists used this feedback to refine the final questionnaire, which was administered from November 9, 2022–January 6, 2023.

## CHAPTER 3 | RESPONSE RATE AND DEMOGRAPHICS

### SAMPLING STRATEGY AND RESPONSE RATE

In November 2022, OPES developed a stratified random sample of 2,044 licensees (out of 6,978 total licensees) to participate in the OA questionnaire. The sample was stratified by years licensed and county of practice, with oversampling of CSRs licensed 0–5 years and CSRs working in counties with fewer than 10 licensees. The Board sent notification letters to the sample of 2,044 CSRs inviting them to complete the online questionnaire.

In December 2022, OPES developed a second sample of 1,000 licensees for a total of 3,044 notification letters sent. Fifty-nine notification letters were returned. The final number of notification letters sent was 2,985. The notification letters are Appendix D.

A total of 373 CSRs, or approximately 12.5% of the CSRs in the two samples, responded by accessing the OA questionnaire. The final sample included in the data analysis was 312 (10.5%). This response rate reflects two adjustments. First, OPES excluded data from respondents who indicated they were not currently licensed and working as a CSR in California. Second, OPES excluded questionnaires containing a large portion of incomplete responses. The final respondent sample appears to represent the California CSR profession based on the sample's demographic composition.

### DEMOGRAPHIC SUMMARY

Table 1 and Figure 1 show that 50.6% of respondents reported that their primary work classification is freelance reporter; 40.7% reported being official court reporters. Respondents were then asked about their primary work environment.

Table 2 and Figure 2 show that 41% of respondents reported that they work in the court system, 39.4% work remotely, and 9.6% work in person.

Most respondents (53.8%) reported being licensed as a CSR in California for more than 20 years, while 24% reported 11–20 years, 10.6% reported 6–10 years, and 10.9% reported 0–5 years (Table 3 and Figure 3).

Respondents were asked how many hours they worked each week as a CSR. Table 4 and Figure 4 show that 42.6% of respondents work 40 or more hours,



followed by 22.1% reporting 30–39 hours, 18.3% reporting 20–29 hours, 9% reporting 10–19 hours, and 7.7% reporting 9 hours or fewer.

Table 5 and Figure 5 show that 45.8% of respondents spent the majority of their time working in depositions, and 45.2% worked the majority of their time in superior court. When asked about types of assistance used in scoping, proofreading, or binding, 47.1% of CSRs reported use of a proofreader, 28.2% CSRs reported use of a scopist, and 23.4% reported use of an agency (Table 6 and Figure 6).

Table 7 and Figure 7 show that the majority of respondents (84.9%) reported that their primary work location is urban. When asked about their highest level of education, 57.4% of respondents reported that they attended a court reporting school, 18.3% reported obtaining an associate degree, and 15.7% reported obtaining a bachelor's degree (Table 8 and Figure 8).

Table 9 shows the types of proceedings worked in the past year. Of the respondents, 61.9% reported family law, 50.6% reported personal injury, and 47.8% reported civil court. Table 10 and Figure 9 show that 90.1% of CSRs reported the California-recognized court reporting school as the eligibility pathway to qualify for the CSR examination, while 6.7% reported having a Registered Professional Reporter (RPR) certificate or certificate of merit.

Respondents were then asked if they had any NCRA certifications. Of those who responded, 31.1% reported having the Registered Professional Reporter (RPR) certificate, and 10.9% reported having the Certified Realtime Reporter (CRR) certificate (Table 11 and Figure 10).

When asked about how many years before they plan to retire, 48.4% of respondents reported 10 years or more, 16.7% reported 7–10 years, 12.5% reported 4–6 years, and 11.5% reported 1–3 years (Table 12 and Figure 11). Respondents were also asked about the time dedicated to official, freelance, and captioner duties. The majority of respondents reported dedicating 100% of their working time as freelance (Table 13).

Table 14 shows the geographical regions where respondents perform most of their work. A breakdown of regional data organized by county is Appendix A. Table 14 shows the location of respondents' primary practice by geographical

region. Additional demographic information from respondents is found in Tables 1-14 and Figures 1-11.

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TABLE 1 – PRIMARY WORK CLASSIFICATION

CLASSIFICATION	NUMBER (N)	PERCENT
Official court reporter	127	40.7
Freelance reporter	158	50.6
Captioner/CART provider	5	1.6
Other	21	6.7
Missing	1	0.3
TOTAL	312	100*

\*NOTE: Percentages do not add to 100% due to rounding.

Figure 1 – PRIMARY WORK CLASSIFICATION

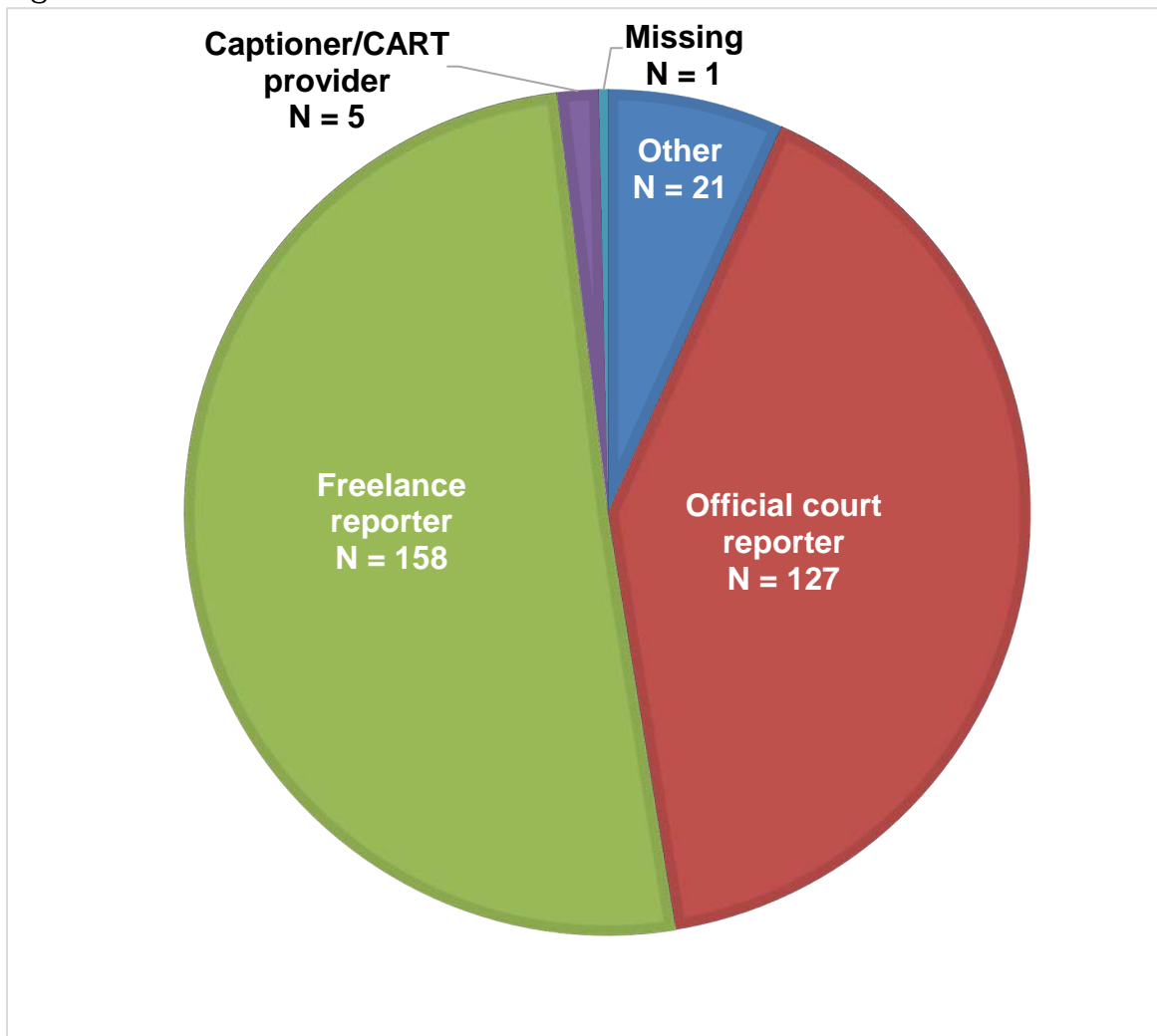


TABLE 2 – PRIMARY WORK ENVIRONMENT

WORK ENVIRONMENT	NUMBER (N)	PERCENT
Court system	128	41.0
Remote	123	39.4
In person	30	9.6
Other	30	9.6
Missing	1	0.3
<b>TOTAL</b>	<b>312</b>	<b>100*</b>

\*NOTE: Percentages do not add to 100% due to rounding.

FIGURE 2 – PRIMARY WORK ENVIRONMENT

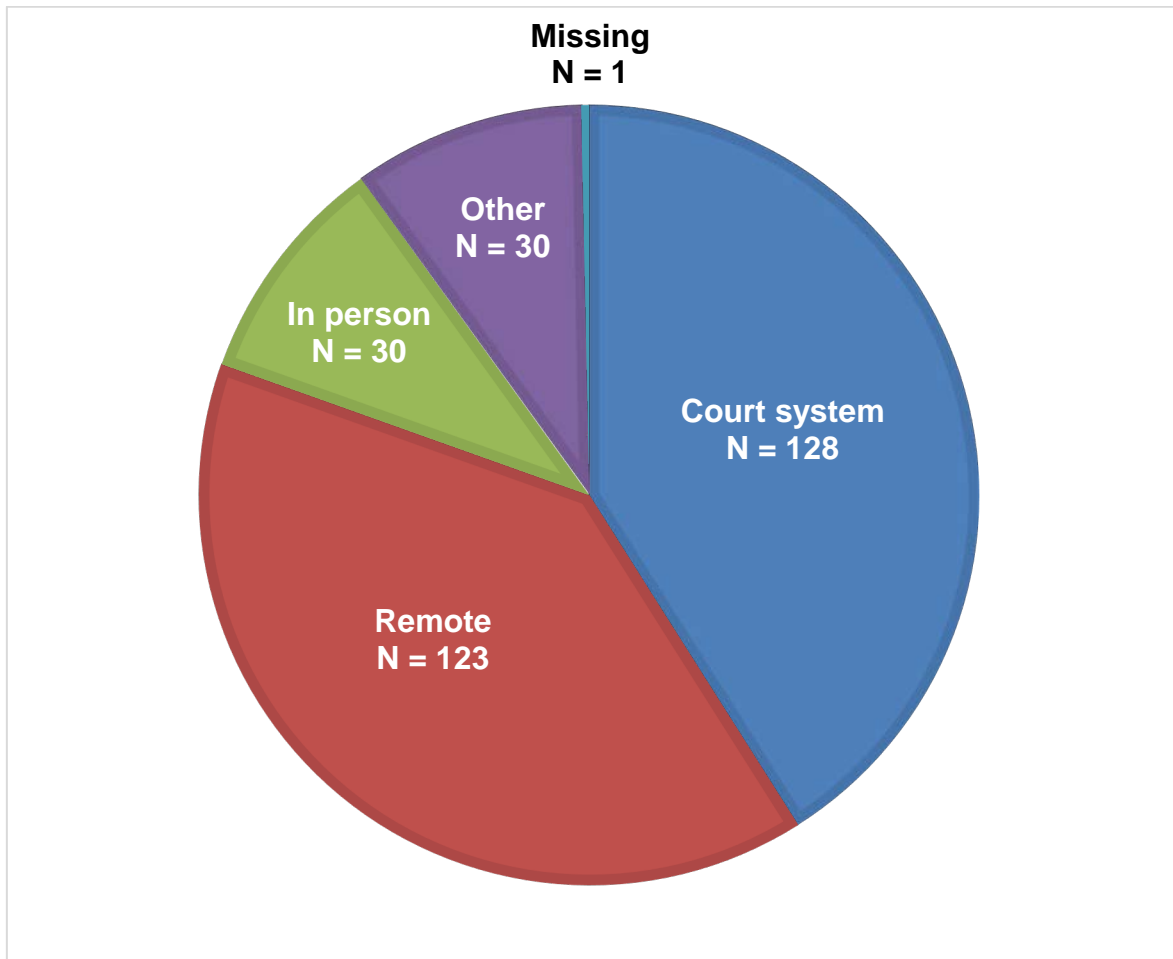


TABLE 3 – NUMBER OF YEARS LICENSED AS A CSR

YEARS	NUMBER (N)	PERCENT
0–5 years	34	10.9
6–10 years	33	10.6
11–20 years	75	24.0
More than 20 years	168	53.8
Missing	2	0.6
<b>TOTAL</b>	<b>312</b>	<b>100*</b>

\*NOTE: Percentages do not add to 100% due to rounding.

FIGURE 3 – NUMBER OF YEARS LICENSED AS A CSR

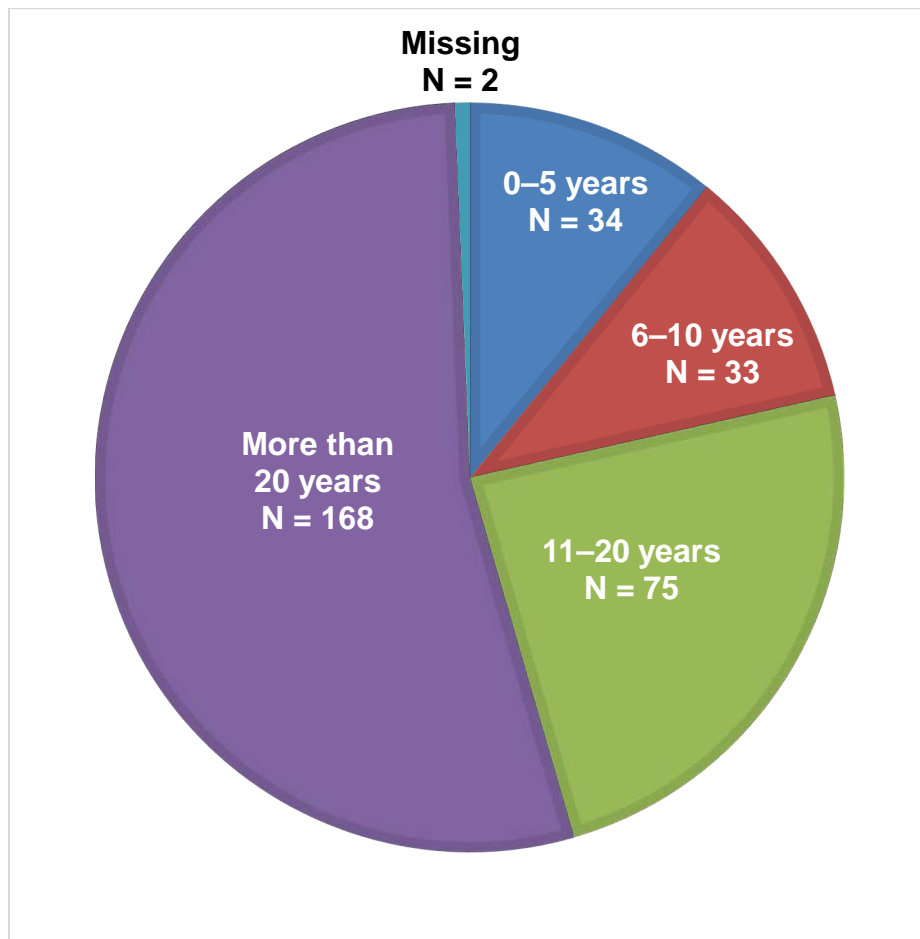


TABLE 4 – HOURS WORKED EACH WEEK

HOURS	NUMBER (N)	PERCENT
0–9 hours	24	7.7
10–19 hours	28	9.0
20–29 hours	57	18.3
30–39 hours	69	22.1
40 or more hours	133	42.6
Missing	1	0.3
<b>TOTAL</b>	<b>312</b>	<b>100</b>

FIGURE 4 – HOURS WORKED EACH WEEK

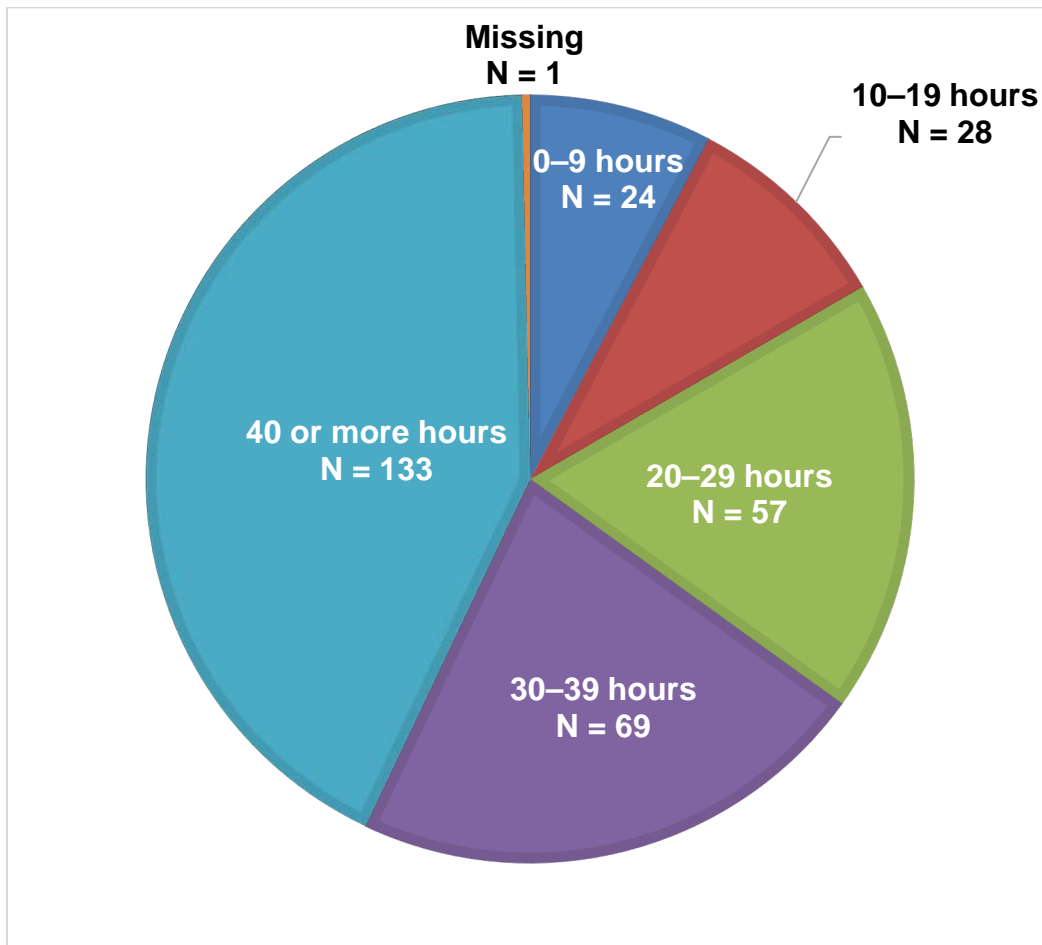


TABLE 5 – MAJORITY OF TIME SPENT WORKING AS A CSR

VENUES	NUMBER (N)	PERCENT
Depositions	143	45.8
Federal Court	10	3.2
Superior Court	141	45.2
Other	17	5.4
Missing	1	0.3
<b>TOTAL</b>	<b>312</b>	<b>100*</b>

\*NOTE: Percentages do not add to 100% due to rounding.

FIGURE 5 – MAJORITY OF TIME SPENT WORKING AS A CSR

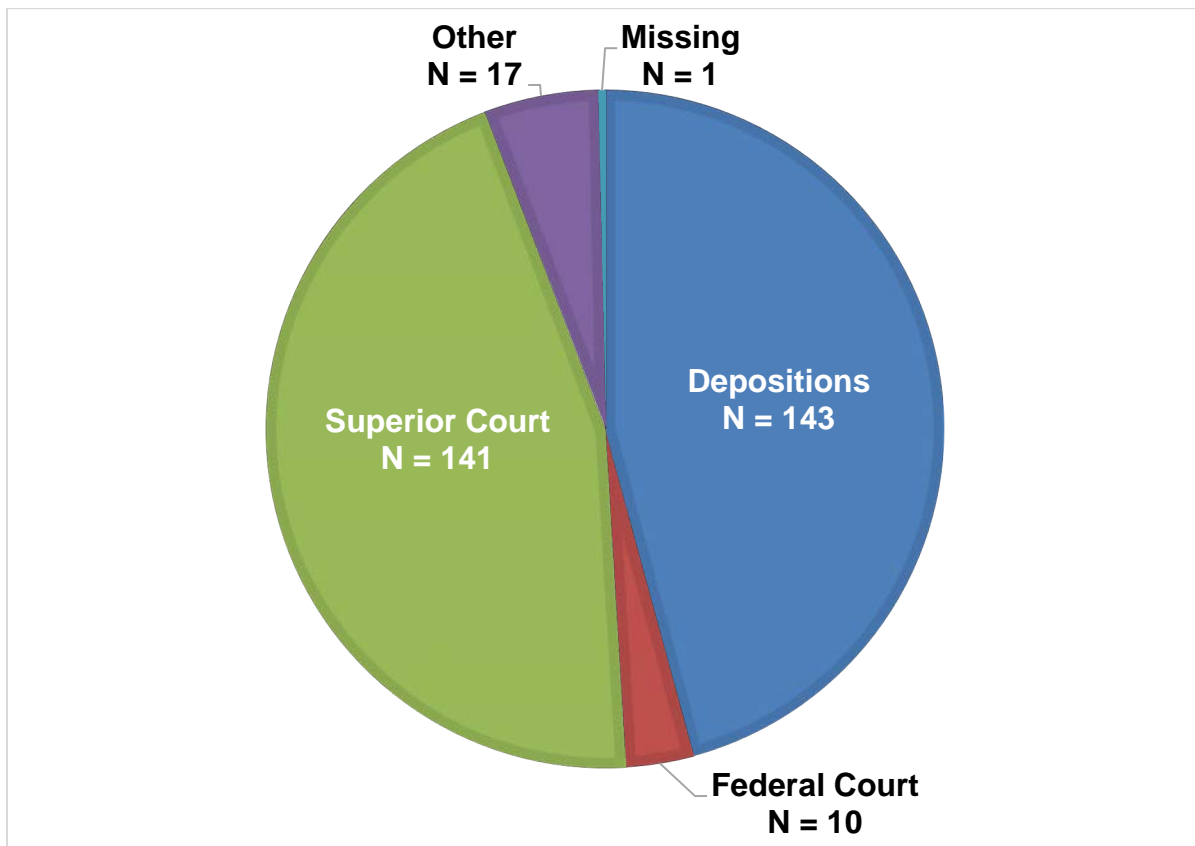




TABLE 6 – ASSISTANCE USED FOR SCOPING, PROOFREADING, OR BINDING

TYPE*	NUMBER (N)	PERCENT**
Scopist	88	28.2
Proofreader	147	47.1
Agency	73	23.4
Production assistant	13	4.2

\*NOTE: Respondents were asked to select all that apply.

\*\*NOTE: Percentages indicate the proportion in the sample of respondents.

FIGURE 6 – ASSISTANCE USED FOR SCOPING, PROOFREADING, OR BINDING

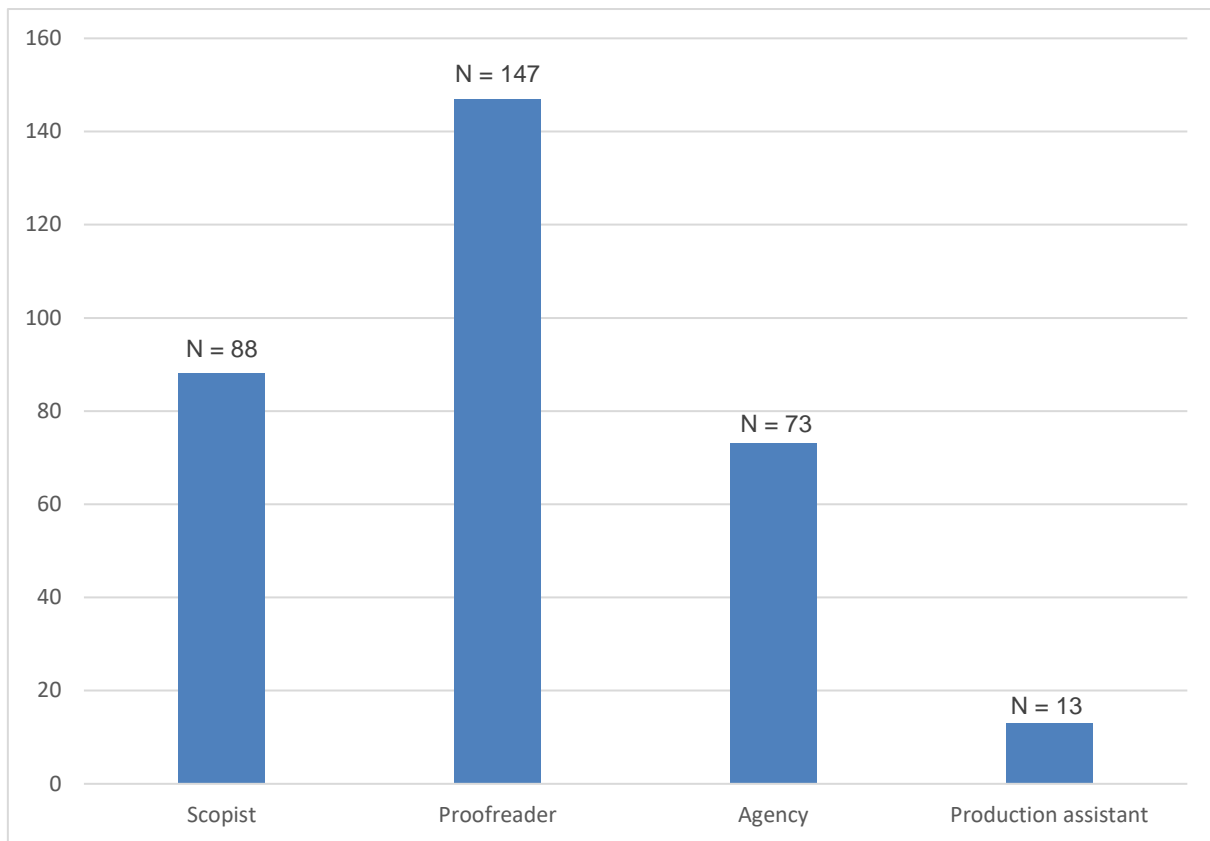


TABLE 7 – LOCATION OF PRIMARY WORK SETTING

LOCATION	NUMBER (N)	PERCENT
Urban (more than 50,000 people)	265	84.9
Rural (fewer than 50,000 people)	43	13.8
Missing	4	1.3
TOTAL	312	100

FIGURE 7 – LOCATION OF PRIMARY WORK SETTING

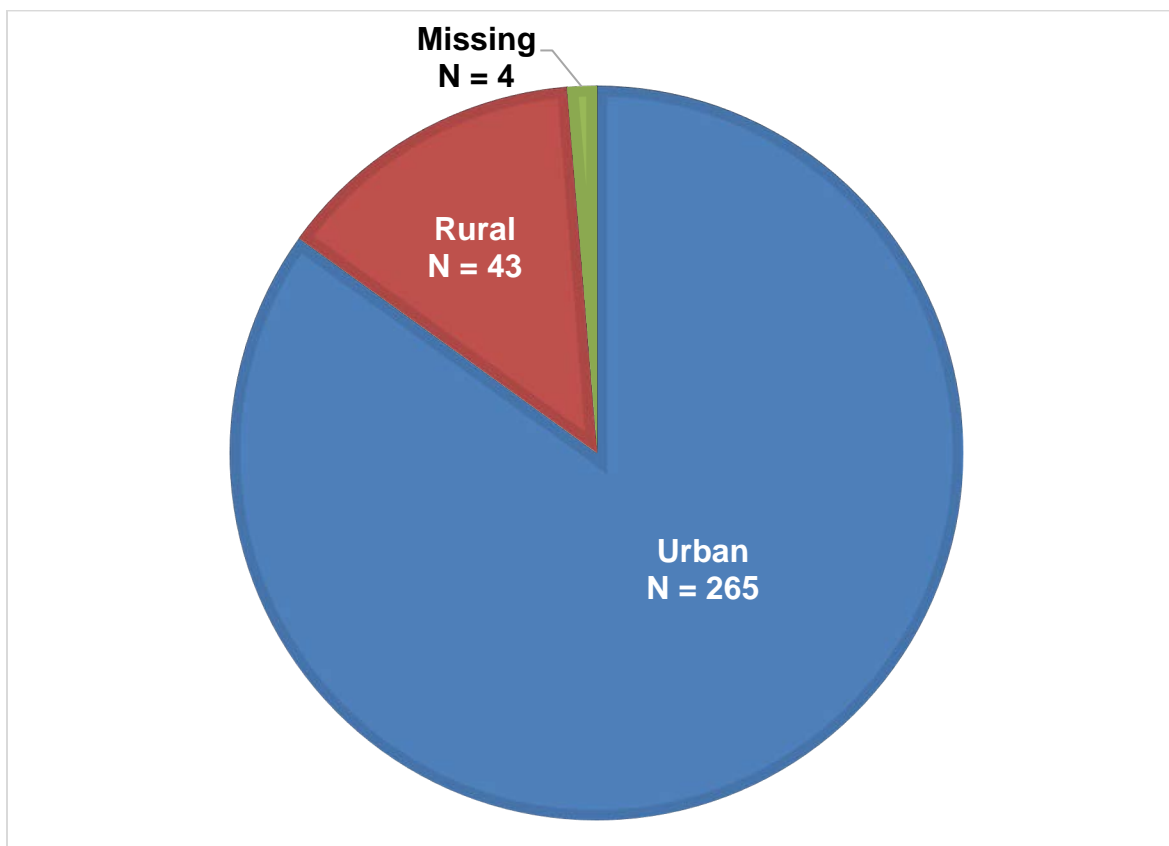


TABLE 8 – HIGHEST LEVEL OF EDUCATION ACHIEVED

LEVEL OF EDUCATION	NUMBER (N)	PERCENT
Court reporting school	179	57.4
Associate degree	57	18.3
Bachelor's degree	49	15.7
Master's degree	7	2.2
Doctorate	2	0.6
Other	18	5.8
TOTAL	312	100

FIGURE 8 – HIGHEST LEVEL OF EDUCATION ACHIEVED

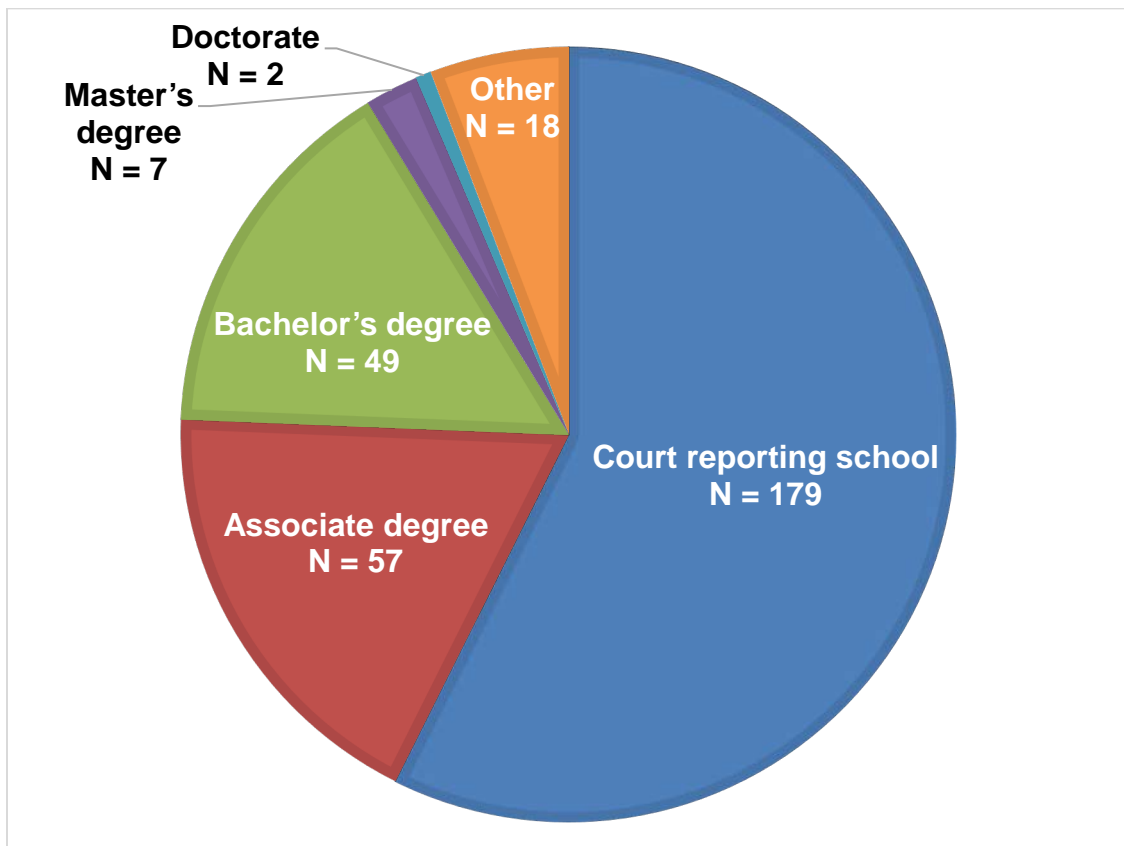


TABLE 9 – TYPES OF PROCEEDINGS WORKED IN THE PAST YEAR

TYPE OF PROCEEDING*	NUMBER (N)	PERCENT**
Family law	193	61.9
Personal injury	158	50.6
Civil court	149	47.8
Workers' compensation	142	45.5
Criminal court	140	44.9
Employment	138	44.2
Business litigation	134	42.9
Domestic dispute/violence	130	41.7
Forensic expert	130	41.7
Elder abuse/neglect	120	38.5
Real estate	107	34.3
Computer-assisted realtime	105	33.7
Landlord-tenant	105	33.7
Discrimination	104	33.3
Juvenile	103	33.0
Probate	102	32.7
Medical malpractice	100	32.1
Law and motion	97	31.1
Construction	96	30.8
Mental health	93	29.8
General malpractice	82	26.3
Witness statements	77	24.7
Competency hearings	76	24.4
Law enforcement	71	22.8

\*NOTE: Respondents were asked to select all that apply.

\*\*NOTE: Percentages indicate the proportion in the sample of respondents.

TABLE 9 – TYPES OF PROCEEDINGS WORKED IN THE PAST YEAR, continued

TYPE OF PROCEEDING*	NUMBER (N)	PERCENT**
Product liability	70	22.4
Arbitration and mediation	64	20.5
Medical examinations	60	19.2
Intellectual property	59	18.9
Bankruptcy	49	15.7
Legal malpractice	43	13.8
Public and private hearings	41	13.1
Administrative	40	12.8
Environmental	40	12.8
Patents and trademarks	40	12.8
Entertainment	39	12.5
Agriculture	25	8.0
Immigration	23	7.4
Conventions and meetings	22	7.1
Maritime	19	6.1
Grand jury	17	5.4
Tax law	14	4.5
Traffic court	12	3.8
Transportation	12	3.8
Oil and gas	10	3.2
Legislative	7	2.2
Public interest	7	2.2
Broadcast captioning	6	1.9
Military	3	1.0

\*NOTE: Respondents were asked to select all that apply.

\*\*NOTE: Percentages indicate the proportion in the sample of respondents.

TABLE 10 – ELEGIBILITY PATHWAY TO QUALIFY FOR CSR EXAMINATIONS

ELEGIBILITY PATHWAY	NUMBER (N)	PERCENT
12 months of full-time work experience	5	1.6
California-recognized court reporting school	281	90.1
National Court Reporters Association (NCRA) Registered Professional Reporter (RPR) certificate or certificate of merit	21	6.7
California State Hearing Reporters Examination	1	0.3
Reciprocity / out of state	3	1.0
Missing	1	0.3
<b>TOTAL</b>	<b>312</b>	<b>100</b>

FIGURE 9 – ELEGIBILITY PATHWAY TO QUALIFY FOR CSR EXAMINATIONS

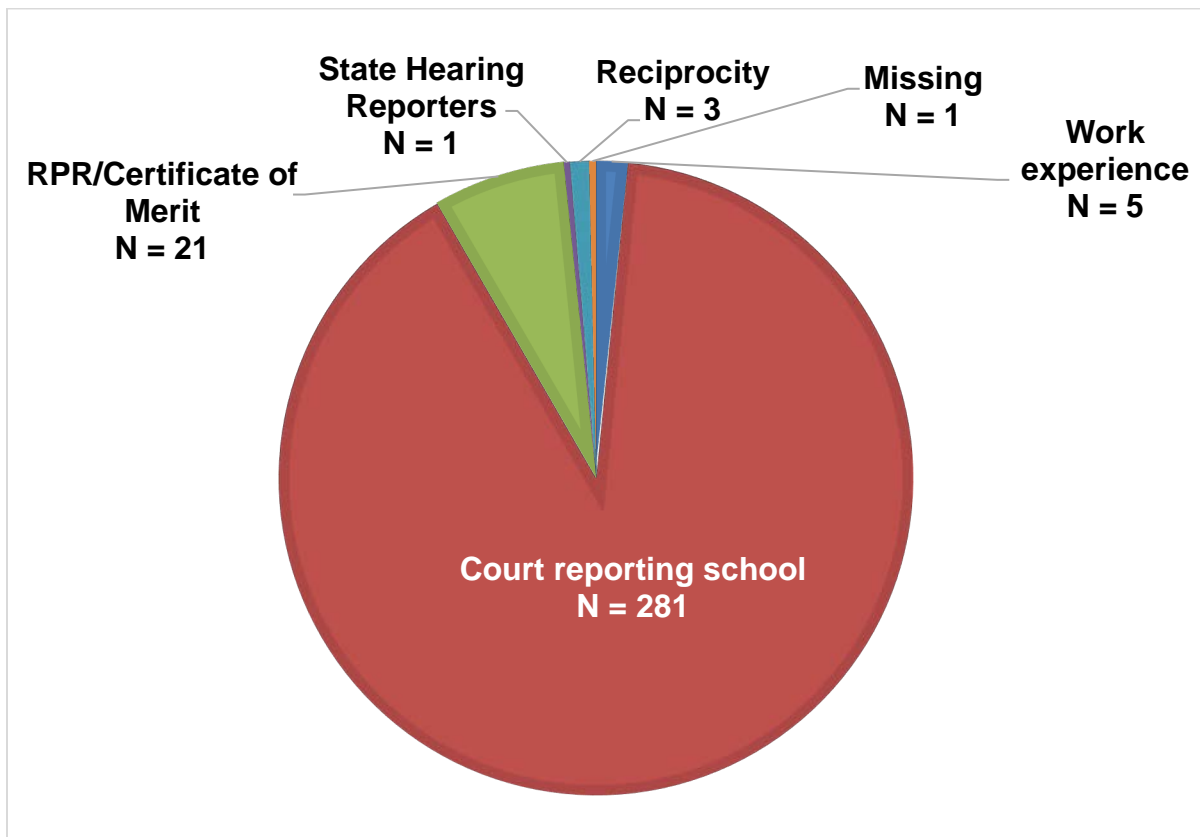


TABLE 11 – NCRA CERTIFICATIONS

CERTIFICATIONS	NUMBER (N)	PERCENT
Registered Skilled Reporter (RSR)	3	1.0
Registered Professional Reporter (RPR)	97	31.1
Registered Merit Reporter (RMR)	17	5.4
Registered Diplomat Reporter (RDR)	6	1.9
Certified Realtime Reporter (CRR)	34	10.9
Certified Realtime Captioner (CRC)	9	2.9
Certified Legal Video Specialist (CLVS)	0	0.0

FIGURE 10 – NCRA CERTIFICATIONS

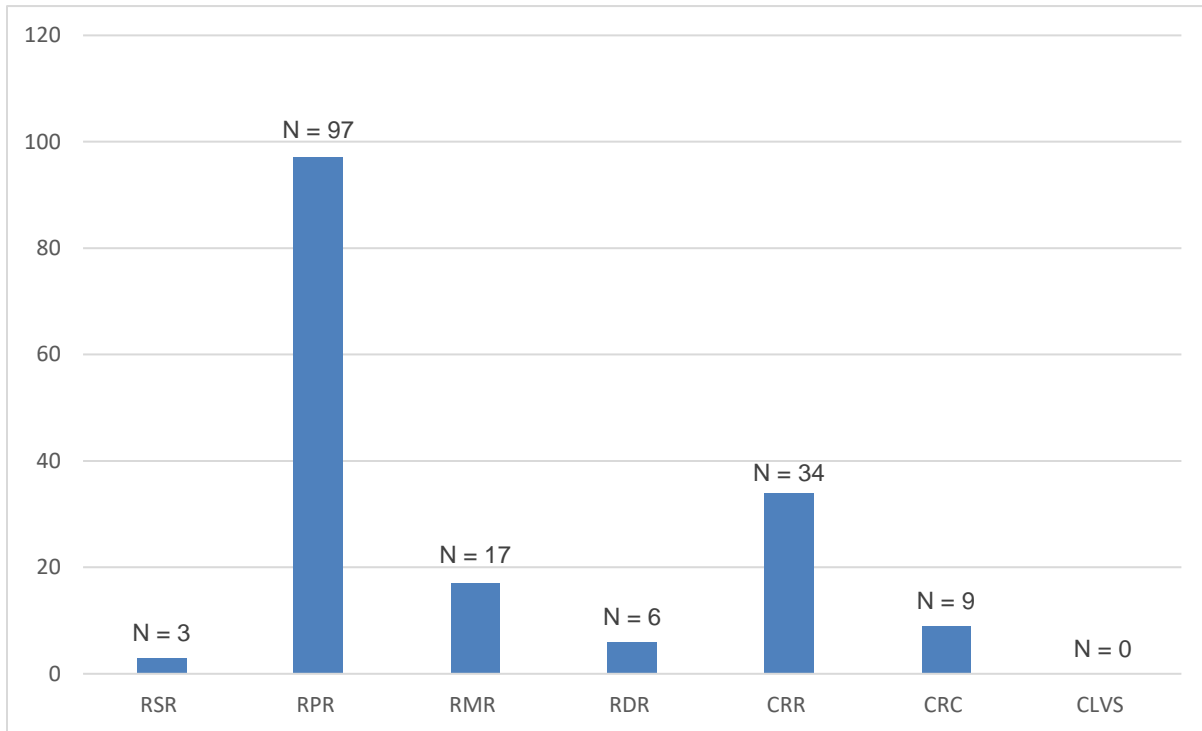


TABLE 12 – YEARS BEFORE RETIREMENT

YEARS BEFORE RETIREMENT	NUMBER (N)	PERCENT
1–3 years	36	11.5
4–6 years	39	12.5
7–10 years	52	16.7
More than 10 years	151	48.4
Other	34	10.9
<b>TOTAL</b>	<b>312</b>	<b>100</b>

Figure 11 – YEARS BEFORE RETIREMENT

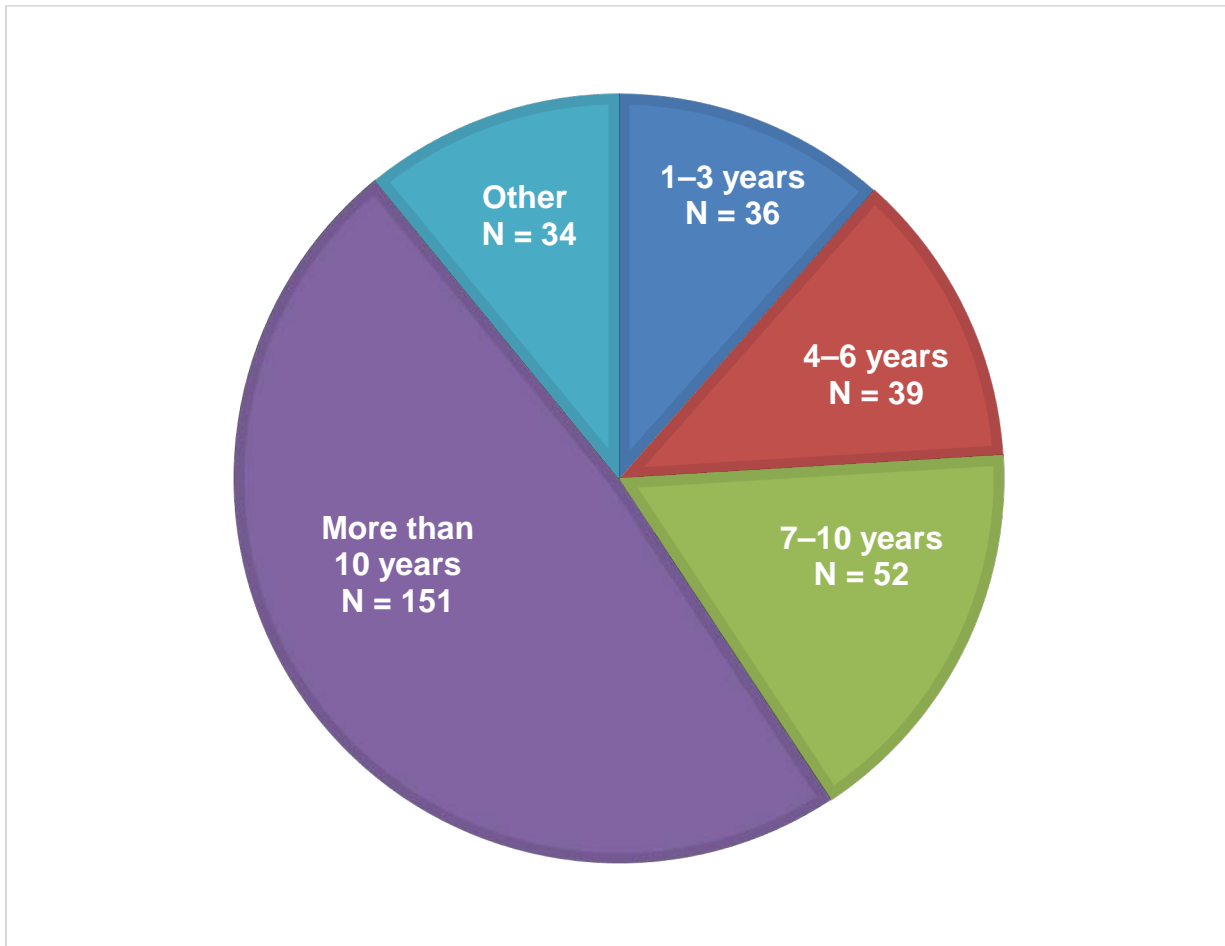




TABLE 13 – TIME DEDICATED TO DUTIES OF EACH WORK CLASSIFICATION

PERCENTAGE OF TIME* **	OFFICIAL	FREELANCE	CAPTIONER/CART
0	41	11	53
1	1	3	2
2	1	1	-
5	4	1	1
10	4	1	4
15	-	1	-
20	4	-	-
25	1	-	1
30	1	1	-
40	1	1	-
50	1	2	1
60	1	1	-
70	1	1	-
75	1	1	-
80	-	4	-
85	2	-	-
90	3	5	-
95	1	3	1
98	1	1	1
99	3	1	-
100	124	145	4

\*NOTE: Respondents were asked to provide the percentage of time they spent carrying out duties in each classification.

\*\*NOTE: Data indicate the proportion of the sample of respondents who reported performing duties within each classification.

TABLE 14 – RESPONDENTS BY REGION

REGION	NUMBER (N)	PERCENT
Los Angeles County and Vicinity	107	34.3
San Francisco Bay Area	53	17.0
San Joaquin Valley	21	6.7
Sacramento Valley	22	7.1
San Diego County and Vicinity	33	10.6
Shasta-Cascade	5	1.6
Riverside and Vicinity	36	11.5
Sierra Mountain Valley	6	1.9
North Coast	11	3.5
South Coast and Central Coast	16	5.1
Missing	2	0.6
Total	312	100*

\*NOTE: Percentages do not add to 100% due to rounding.

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## CHAPTER 4 | DATA ANALYSIS AND RESULTS

### RELIABILITY OF RATINGS

OPES evaluated the tasks and knowledge statement ratings obtained from the questionnaire respondents with a standard index of reliability, coefficient alpha ( $\alpha$ ), which ranges from 0 to 1. Coefficient alpha is an estimate of the internal consistency of the respondents' ratings of the tasks and knowledge statements. A higher coefficient value indicates more consistency between respondent ratings. Coefficients were calculated for all respondent ratings.

Table 15 displays the reliability coefficients for the task rating scale in each content area. The overall ratings of task frequency and task importance across content areas were highly reliable (Frequency  $\alpha = .903$ ; Importance  $\alpha = .826$ ). Table 16 displays the reliability coefficients for the knowledge statement rating scale in each content area. The overall ratings of knowledge importance across content areas were highly reliable ( $\alpha = .960$ ). These results indicate that the responding CSRs rated the tasks and knowledge statements consistently throughout the questionnaire.

TABLE 15 – TASK SCALE RELIABILITY

CONTENT AREA*	NUMBER OF TASKS	$\alpha$ FREQUENCY	$\alpha$ IMPORTANCE
1. Reporting Proceedings	14	0.745	0.686
2. Transcribing Proceedings	6	0.852	0.731
3. Research and Language Skills	7	0.839	0.777
4. Transcript Management	9	0.605	0.692
5. Ethics	4	0.765	0.443
Overall	40	0.903	0.826

\*Note: Reliability was calculated using all tasks in the questionnaire.

TABLE 16 – KNOWLEDGE STATEMENTS SCALE RELIABILITY

CONTENT AREA*	NO. OF KNOWLEDGE STATEMENTS	$\alpha$ IMPORTANCE
1. Reporting Proceedings	22	0.854
2. Transcribing Proceedings	14	0.871
3. Research and Language Skills	11	0.919
4. Transcript Management	15	0.864
5. Ethics	10	0.895
Overall	72	0.960

\*Note: Reliability was calculated using all knowledge statements in the questionnaire.

### TASK CRITICALITY INDICES

To calculate the criticality indices of the tasks, OPES test specialists used the following formula. For each respondent, OPES first multiplied the frequency rating (Fi) and the importance rating (Ii) for each task. Next, OPES averaged the multiplication products across respondents as shown below:

$$\text{Task criticality index} = \text{mean} [(Fi) \times (Ii)]$$

The tasks were grouped by content area and sorted in descending order of their criticality index. The tasks included in the questionnaire, along with their mean frequency and importance ratings and their associated criticality indices are Appendix B.

OPES test specialists convened a workshop of 7 SMEs in January 2023. The purpose of this workshop was to identify the essential tasks and knowledge required for safe and competent CSR practice at the time of licensure. The SMEs reviewed the mean frequency and importance ratings for each task and its criticality index to determine whether to establish a cutoff value below which tasks should be eliminated. Based on their review of the relative importance of tasks to CSR practice, the SMEs determined that no cutoff value should be set and that all the tasks should be retained. However, SMEs determined that in task 36, the word “bills” should be changed to “invoices.” This statement, with its original wording and the change, is highlighted in Appendix B.

## KNOWLEDGE STATEMENTS IMPORTANCE RATINGS

To determine the importance of each knowledge statement, the mean importance (K Imp) rating for each knowledge statement was calculated. The knowledge statements included in the questionnaire, sorted in descending order by content area, and presented along with their mean importance ratings, are Appendix C.

The SMEs who participated in the January 2023 workshop also reviewed the knowledge statements mean importance ratings. After reviewing the mean importance ratings and considering their relative importance to CSR practice, the SMEs determined that no cutoff value should be set. However, the SMEs determined that knowledge statement 11 should be changed from “to stenographically or via voice notes identify multiple speakers” to “to identify multiple speakers stenographically or via voice notes” to make the statement clearer. This statement, with its original wording and the change, is included in Appendix C.

## TASK-KNOWLEDGE LINKAGE

The 4 SMEs who participated in the February 2023 workshop reviewed the preliminary assignments of the tasks and knowledge statements to the content areas determined in the January 2023 workshop. The SMEs then confirmed the final linkage between tasks and knowledge statements.

Table 18, Table 19, and Table 20 contain the final tasks and knowledge statements that comprise the California Certified Shorthand Reporter Licensure Examinations' examination outlines.

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## CHAPTER 5 | EXAMINATION OUTLINE

### CONTENT AREAS AND WEIGHTS

The SMEs who participated in the January and February 2023 workshops were also asked to finalize the weights of the content areas that would form the California Certified Shorthand Reporter Licensure Examinations' examination outlines. OPES test specialists presented the SMEs with preliminary weights of the content areas, which were calculated by dividing the sum of the criticality indices for the tasks in each content area by the overall sum of the criticality indices for all tasks, as shown below.

$$\frac{\text{Sum of Criticality Indices for Tasks in Content Area}}{\text{Sum of Criticality Indices for All Tasks}} = \text{Percent Weight of Content Area}$$

The SMEs evaluated the preliminary content area weights in terms of how well they reflected the relative importance of each content area to entry level CSR practice in California. Through discussion, the SMEs determined that adjustments to the preliminary weights were necessary to more accurately reflect the relative importance of each area to CSR practice. The final weights for the English Examination and the Dictation Examination were identical to the preliminary weights. A summary of the preliminary and final content area weights for the Professional Practice Examination is presented in Table 17.

TABLE 17 – PROFESSIONAL PRACTICE EXAMINATION CONTENT AREA WEIGHTS

CONTENT AREA	PERCENT WEIGHTS PRELIMINARY	PERCENT WEIGHTS FINAL
1. Reporting Proceedings	32.0	32.0
2. Transcribing Proceedings	25.7	26.0
3. Transcript Management	24.8	25.0
4. Ethics	17.6	17.0
TOTAL	100*	100

\*NOTE: Percentages do not add to 100% due to rounding.



The SMEs reviewed the content areas and wrote descriptions for each content area. They organized the tasks and knowledge statements into subareas within each content area and distributed the content area weight across the subareas. The content areas, subareas, and associated weights were then finalized and provide the basis for the California Certified Shorthand Reporter Licensure Examinations' examination outlines. The final English examination outline is presented in Table 18. The final Professional Practice examination outline is presented in Table 19. The final Dictation examination outline is presented in Table 20.

TABLE 18 – EXAMINATION OUTLINE FOR THE CALIFORNIA CERTIFIED SHORTHAND REPORTER EXAMINATION:  
ENGLISH

**Content Area. RESEARCH AND LANGUAGE SKILLS**

This area assesses a candidate’s ability to follow current rules of punctuation, grammar, word usage, and vocabulary to ensure accuracy of the transcript.

Subsection	Tasks	Associated Knowledge Statements
1. Grammar (15%)	T27. Maintain English grammar knowledge to assist in accurately capturing and transcribing verbatim proceedings.	K41. Knowledge of how to recognize and correct homonym-type errors. K42. Knowledge of how to recognize and correct word usage errors. K43. Knowledge of English language vocabulary. K45. Knowledge of rules of English grammar.
2. Proofreading (65%)	T22. Proofread transcripts for correct punctuation according to CRB Best Practices to ensure a verbatim record of proceedings. T23. Proofread transcripts according to CRB Best Practices to ensure the absence of errors in spelling, typography, and word usage (e.g., homonym-type errors).	K35. Knowledge of rules of punctuation. K45. Knowledge of rules of English grammar. K37. Knowledge of legal terminology and spelling. K38. Knowledge of medical terminology and spelling. K39. Knowledge of technical terminology and spelling. K41. Knowledge of how to recognize and correct homonym-type errors. K42. Knowledge of how to recognize and correct word usage errors. K43. Knowledge of English language vocabulary. K45. Knowledge of rules of English grammar.
3. Vocabulary (20%)	T26. Maintain vocabulary knowledge with general terminology to assist in accurately capturing and transcribing verbatim proceedings.	K37. Knowledge of legal terminology and spelling. K38. Knowledge of medical terminology and spelling. K39. Knowledge of technical terminology and spelling. K43. Knowledge of English language vocabulary.

TABLE 19 – EXAMINATION OUTLINE FOR THE CALIFORNIA CERTIFIED SHORTHAND REPORTER EXAMINATION:  
PROFESSIONAL PRACTICE

**Content Area 1. REPORTING PROCEEDINGS (32%)**

This area assesses the candidate’s knowledge of procedures for gathering information using stenographic or voice-writing equipment and computer-aided transcription software according to laws, regulations, and CRB Best Practices to create a verbatim record.

Tasks	Associated Knowledge Statements
T2. Obtain information from the court calendar or case caption from the court website to aid in transcript preparation.	K1. Knowledge of the information provided in the court calendar. K2. Knowledge of methods to obtain case caption information.
T3. Obtain all parties’ names and contact information from a variety of sources to facilitate transcript production and distribution.	K1. Knowledge of the information provided in the court calendar. K2. Knowledge of methods to obtain case caption information. K3. Knowledge of methods to identify parties for the record.
T4. Control the proceedings according to statutes and regulations to ensure verbatim records.	K4. Knowledge of the reporter’s duties in court or deposition proceedings according to the statutes, regulations, and CRB Best Practices. K8. Knowledge of CRB Best Practices for Exhibit Handling for Depositions. K9. Knowledge of procedures for reading stenographic or voice notes aloud when requested in proceedings. K12. Knowledge that the stenographic or voice notes are the official record. K13. Knowledge of statutes and CRB Best Practices pertaining to when to go on and off the record during proceedings. K17. Knowledge of how to assert control during proceedings to ensure accuracy of the record. K18. Knowledge of when follow-up clarification is required to ensure accuracy of the record.
T5. Administer the oath to witnesses and interpreters according to statutes and CRB Best Practices.	K4. Knowledge of the reporter’s duties in court or deposition proceedings according to the statutes, regulations, and CRB Best Practices. K14. Knowledge of protocols and procedures for reporting proceedings conducted through an interpreter. K15. Knowledge of CRB Best Practices for Interpreted Depositions.

**Content Area 1. REPORTING PROCEEDINGS, continued (32%)**

This area assesses the candidate's knowledge of procedures for gathering information using stenographic or voice-writing equipment and computer-aided transcription software according to laws, regulations, and CRB Best Practices to create a verbatim record.

Tasks	Associated Knowledge Statements
T7. Use computer-aided transcription (CAT) software and equipment according to guidelines to provide realtime translation and onsite and remote streaming.	<p>K5. Knowledge of the capabilities of computer-aided transcription (CAT) software and hardware, and of how to use it.</p> <p>K6. Knowledge of stenographic or voice-writing equipment operation and maintenance to facilitate verbatim reporting.</p> <p>K19. Knowledge of equipment required to provide realtime translation and onsite and remote streaming.</p> <p>K21. Knowledge of CRB Best Practices for Videoconference/Remote Reporting regarding equipment and technology.</p> <p>K20. Knowledge of relevant statutes regarding the provision of realtime translation.</p>
T10. Report interpreted proceedings to make an accurate transcription and comply with protocols and procedures.	<p>K14. Knowledge of protocols and procedures for reporting proceedings conducted through an interpreter.</p> <p>K15. Knowledge of CRB Best Practices for Interpreted Depositions.</p>
T11. Mark exhibits introduced for identification during proceedings and inclusion in the record.	<p>K7. Knowledge of the procedures regarding marking of exhibits to ensure identification in the in-person and remote environment.</p> <p>K8. Knowledge of CRB Best Practices for Exhibit Handling for Depositions.</p>
T12. Flag portions of proceedings requiring further clarification.	<p>K18. Knowledge of when follow-up clarification is required to ensure accuracy of the record.</p> <p>K22. Knowledge of how to operate the stenographic or voice-writing equipment to flag proceedings at the speed required.</p>
T13. Cease and resume the reporting of proceedings as required by statutes and CRB Best Practices.	<p>K13. Knowledge of statutes and CRB Best Practices pertaining to when to go on and off the record during proceedings.</p> <p>K17. Knowledge of how to assert control during proceedings to ensure accuracy of the record.</p>
T14. Read back proceedings as requested.	<p>K9. Knowledge of procedures for reading stenographic or voice notes aloud when requested in proceedings.</p> <p>K10. Knowledge of CRB Best Practices for Reporter Conduct Read-back in the Jury Room and protocol and methods of identifying court testimony that may not be read back.</p>

## Content Area 2. TRANSCRIBING PROCEEDINGS (26%)

This area assesses the candidate's ability to prepare and create an accurate certified transcript from the stenographic or voice record in a format that conforms to laws, regulations, and CRB Best Practices.

Tasks	Associated Knowledge Statements
T15. Prepare transcripts of proceedings from translated stenographic notes to create an official record.	K24. Knowledge of the capabilities of court reporting software and how to apply it to produce transcripts of proceedings. K25. Knowledge of Minimum Transcript Format Standards requirements. K28. Knowledge of use of caption information in transcript preparation.
T16. Create cover, appearance, index, and certificate pages according to CRB Best Practices to conform to statutes.	K23. Knowledge of the procedures for creating an exhibit index. K26. Knowledge of transcript certificate page requirements. K27. Knowledge of transcript cover page requirements. K29. Knowledge of methods and procedures for producing indices in a record on appeal.
T17. Maintain current stenographic or voice-writing dictionaries to facilitate transcript production.	K32. Knowledge of conditions that require redaction in the transcript. K24. Knowledge of the capabilities of court reporting software and how to apply it to produce transcripts of proceedings. K36. Knowledge of backing up, maintenance, and archival of stenographic dictionaries.
T19. Maintain confidentiality of transcripts in accordance with statutes and CRB Best Practices.	K31. Knowledge of statutes and CRB Best Practices pertaining to formatting and production of transcripts of confidential proceedings. K32. Knowledge of conditions that require redaction in the transcript.

**Content Area 2. TRANSCRIBING PROCEEDINGS, continued (26%)**

This area assesses the candidate's ability to prepare and create an accurate certified transcript from the stenographic or voice record in a format that conforms to laws, regulations, and CRB Best Practices.

Tasks	Associated Knowledge Statements
T20. Ensure that transcripts meet regulatory requirements and jurisdictional rules to aid in administration of justice.	K25. Knowledge of Minimum Transcript Format Standards requirements. K31. Knowledge of statutes and CRB Best Practices pertaining to formatting and production of transcripts of confidential proceedings. K32. Knowledge of conditions that require redaction in the transcript. K34. Knowledge of Board-recommended formatting distinctions between rough drafts and certified copies. K33. Knowledge of transcript production requirements in death penalty cases.
T21. Research citations stated on the record using authoritative research resources to ensure that information is correct.	K44. Knowledge of research methods to verify citations. K46. Knowledge of case citation formats. K47. Knowledge of authoritative research resources used to proofread transcripts.

### Content Area 3. TRANSCRIPT MANAGEMENT (25%)

This area assesses the candidate's knowledge of laws, regulations, and CRB Best Practices pertaining to the preparation, sale, notification, delivery, and maintenance of records, transcripts, and exhibits.

Tasks	Associated Knowledge Statements
T28. Prepare electronic files of transcripts for secure electronic delivery when requested or required.	K52. Knowledge of methods to produce electronic files. K53. Knowledge of methods to protect and secure electronic documents. K57. Knowledge of privacy issues related to transcript production. K61. Knowledge of CRB Best Practices Rough Draft Transcripts and methods to electronically produce rough draft transcripts.
T29. Affix an electronic signature to reporter's certificate according to court protocols and local practices for transcripts delivered electronically.	K52. Knowledge of methods to produce electronic files. K54. Knowledge of methods to electronically sign documents.
T30. Fulfill requests for rough draft transcripts pursuant to statutes and CRB Best Practices.	K61. Knowledge of CRB Best Practices Rough Draft Transcripts and methods to electronically produce rough draft transcripts. K62. Knowledge of methods to deliver rough draft transcripts.
T31. Notify deponent when transcripts are ready for review and signature by sending written notice pursuant to statutes and applicable standards.	K58. Knowledge of codes pertaining to the reading and signing of a transcript by the witness.
T32. Prepare and deliver certified transcripts when requested or required by code.	K51. Knowledge of time limits required to produce and deliver finished transcripts. K52. Knowledge of methods to produce electronic files. K55. Knowledge of requirements pertaining to the filing of sealed court transcripts. K56. Knowledge of how to copy and attach exhibits to original transcripts and certified copies of transcripts. K57. Knowledge of privacy issues related to transcript production. K60. Knowledge of methods to deliver certified transcripts.

### Content Area 3. TRANSCRIPT MANAGEMENT, continued (25%)

This area assesses the candidate's knowledge of laws, regulations, and CRB Best Practices pertaining to the preparation, sale, notification, delivery, and maintenance of records, transcripts, and exhibits.

Tasks	Associated Knowledge Statements
T33. Maintain custody of deposition exhibits according to CRB Best Practices for production of transcripts and distribution upon completion.	K48. Knowledge of the procedures for handling exhibits in person and in a remote environment to ensure safekeeping and distribution. K56. Knowledge of how to copy and attach exhibits to original transcripts and certified copies of transcripts.
T34. Retain stenographic or voice notes of proceedings to ensure security and accessibility according to statute.	K49. Knowledge of backing up, maintaining, and archiving of stenographic or voice notes. K50. Knowledge of statute pertaining to maintenance and disposition of stenographic or voice notes. K53. Knowledge of methods to protect and secure electronic documents.
T35. Deliver stenographic or voice notes to the court when required.	K50. Knowledge of statute pertaining to the maintenance and disposition of stenographic or voice notes.
T36. Prepare invoices for products and services in accordance with applicable statutes.	K59. Knowledge of statutes and regulations regarding the sale of CSR products and services.



**Content Area 4. ETHICS (17%)**

This area assesses the candidate's ability to adhere to laws, regulations, and CRB Best Practices pertaining to professional and ethical conduct.

Tasks	Associated Knowledge Statements
T37. Perform the tasks required of CSRs in accordance with scope of practice.	<p>K64. Knowledge of notification requirements when a party to the proceeding requests any part or form of a transcript.</p> <p>K66. Knowledge of requirements to act impartially and remain neutral toward all parties to a proceeding.</p> <p>K67. Knowledge of the Professional Standards of Practice for Certified Shorthand Reporters.</p> <p>K70. Knowledge of BPC sections related to CSRs.</p>
T38. Practice and apply impartiality and confidentiality in accordance with statutes and regulations.	<p>K63. Knowledge of statutes and regulations requiring confidentiality of proceedings.</p> <p>K65. Knowledge of requirements when a third party requests any part of a transcript.</p> <p>K66. Knowledge of requirements to act impartially and remain neutral toward all parties to a proceeding.</p> <p>K68. Knowledge of laws and regulations pertaining to disclosure of conflicts of interest.</p> <p>K69. Knowledge of laws and CRB Best Practices concerning off-the-record or protected discussions.</p>
T39. Practice and apply state and local rules of court and applicable statutes and CRB Best Practices.	<p>K64. Knowledge of notification requirements when a party to the proceeding requests any part or form of a transcript.</p> <p>K67. Knowledge of the Professional Standards of Practice for Certified Shorthand Reporters.</p> <p>K70. Knowledge of BPC sections related to CSRs.</p> <p>K72. Knowledge of statute regarding court reporting firm registration and applicable duties of the CSR related to statute.</p>

**Content Area 4. ETHICS, continued (17%)**

This area assesses the candidate's ability to adhere to laws, regulations, and CRB Best Practices pertaining to professional and ethical conduct.

Tasks	Assessment Knowledge Statements
T40. Use backup audio media (BAM) in accordance with laws, regulations, and CRB Best Practices.	K63. Knowledge of statutes and regulations requiring confidentiality of proceedings.
	K65. Knowledge of requirements when a third party requests any part of a transcript.
	K69. Knowledge of laws, regulations, and CRB Best Practices concerning off-the-record or protected discussions.
	K71. Knowledge of use of backup audio media (BAM) according to CRB Best Practices.

TABLE 20 – EXAMINATION OUTLINE FOR THE CALIFORNIA CERTIFIED SHORTHAND REPORTER EXAMINATION: DICTATION

**Content Area 1. REPORTING PROCEEDINGS**

This area assesses the candidate’s ability to utilize stenographic or voice-writing equipment and computer-aided transcription software to create a verbatim record.

Tasks	Associated Knowledge Statements
T1. Set up equipment according to guidelines to prepare for reporting in-person and remote proceedings.	<p>K5. Knowledge of the capabilities of computer-aided transcription (CAT) software and hardware, and of how to use it.</p> <p>K6. Knowledge of stenographic or voice-writing equipment operation and maintenance to facilitate verbatim reporting.</p> <p>K19. Knowledge of equipment required to provide realtime translation and onsite and remote streaming.</p>
T3. Obtain all parties’ names and contact information from a variety of sources to facilitate transcript production and distribution.	<p>K1. Knowledge of the information provided in the court calendar.</p> <p>K3. Knowledge of methods to identify parties for the record.</p>
T6. Use stenographic or voice-writing equipment with the fluency and speed required to capture verbatim testimony and make an accurate transcription.	<p>K6. Knowledge of stenographic or voice-writing equipment operation and maintenance to facilitate verbatim reporting.</p>
T7. Use computer-aided transcription (CAT) software and equipment according to guidelines to provide realtime translation and onsite and remote streaming.	<p>K5. Knowledge of the capabilities of computer-aided transcription (CAT) software and hardware, and of how to use it.</p> <p>K19. Knowledge of equipment required to provide realtime translation and onsite and remote streaming.</p>
T8. Use speaker identification in the transcript to attribute statements made on the record.	<p>K3. Knowledge of methods to identify parties for the record.</p> <p>K6. Knowledge of stenographic or voice-writing equipment operation and maintenance to facilitate verbatim reporting.</p> <p>K11. Knowledge of methods to identify multiple speakers stenographically or via voice notes to accurately attribute statements.</p>

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**Content Area 1. REPORTING PROCEEDINGS, continued**

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- T9. Report proceedings to make an accurate transcription and comply with protocols and procedures.
- K3. Knowledge of methods to identify parties for the record.  
K11. Knowledge of methods to identify multiple speakers stenographically or via voice notes to accurately attribute statements.  
K16. Knowledge of how to operate a stenographic or voice-writing equipment at the speed required.
- 

**Content Area 2. TRANSCRIBING PROCEEDINGS**

This area assesses the candidate's ability to prepare and create an accurate transcript from the stenographic or voice record formatted to applicable standards.

---

**Tasks****Associated Knowledge Statements**

- |   |   |
|---|---|
| T18. Punctuate transcripts within Board-approved guidelines to accurately reflect the proceedings.                      | K30. Knowledge of basic computer operating functions and capabilities.<br>K35. Knowledge of rules of punctuation. |
| T20. Ensure that transcripts meet regulatory requirements and jurisdictional rules to aid in administration of justice. | K25. Knowledge of Minimum Transcript Format Standards requirements.   |
-

### Content Area 3. RESEARCH AND LANGUAGE SKILLS

This area assesses the candidate's ability to follow current rules of punctuation, grammar, word usage, and vocabulary to prepare the transcript.

Tasks	Associated Knowledge Statements
T21. Research citations stated on the record using authoritative research resources to ensure that information is correct.	K44. Knowledge of research methods to verify citations. K46. Knowledge of case citation formats. K47. Knowledge of authoritative research resources used to proofread transcripts.
T22. Proofread transcripts for correct punctuation according to CRB Best Practices to ensure a verbatim record of proceedings.	K35. Knowledge of rules of punctuation. K45. Knowledge of rules of English grammar.
T23. Proofread transcripts according to CRB Best Practices to ensure the absence of errors in spelling, typography, and word usage (e.g., homonym-type errors).	K41. Knowledge of how to recognize and correct homonym-type errors. K42. Knowledge of how to recognize and correct word usage errors. K45. Knowledge of rules of English grammar.
T24. Research obscure or unfamiliar terms mentioned during proceedings to ensure accuracy.	K40. Knowledge of methods to research obscure or unfamiliar terminology and spelling.
T25. Research the spelling of medical, legal, and technical terminology used during proceedings to ensure accuracy.	K37. Knowledge of legal terminology and spelling. K38. Knowledge of medical terminology and spelling. K39. Knowledge of technical terminology and spelling.
T26. Maintain vocabulary knowledge with general terminology to assist in accurately capturing and transcribing verbatim proceedings.	K37. Knowledge of legal terminology and spelling. K38. Knowledge of medical terminology and spelling. K39. Knowledge of technical terminology and spelling.
T27. Maintain English grammar knowledge to assist in accurately capturing and transcribing verbatim proceedings.	K42. Knowledge of how to recognize and correct word usage errors. K45. Knowledge of rules of English grammar.

#### **Content Area 4. TRANSCRIPT MANAGEMENT**

This area assesses the candidate's ability to prepare and deliver the transcript in a timely manner.

Tasks	Associated Knowledge Statements
T28. Prepare electronic files of transcripts for secure electronic delivery when requested or required.	K52. Knowledge of methods to produce electronic files. K53. Knowledge of methods to protect and secure electronic documents. K57. Knowledge of privacy issues related to transcript production. K60. Knowledge of methods to deliver certified transcripts.

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## CHAPTER 6 | CONCLUSIONS

The OA of the CSR profession described in this report provides a comprehensive description of current CSR practice in California. The procedures employed to perform the OA were based on a content validation strategy to ensure that the results accurately represent CSR practice. Results of this OA provide information regarding current practice that can be used to develop valid and legally defensible California Certified Shorthand Reporter Licensure Examinations.

Use of the California Certified Shorthand Reporter Licensure Examinations' examination outlines contained in this report ensures that the Board is compliant with BPC § 139.

This report provides all documentation necessary to verify that the analysis has been completed in accordance with legal, professional, and technical standards.



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**APPENDIX A | RESPONDENTS BY REGION**

## LOS ANGELES COUNTY AND VICINITY

County of Practice	Frequency
Los Angeles	83
Orange	24
TOTAL	107

## NORTH COAST

County of Practice	Frequency
Del Norte	2
Humboldt	1
Mendocino	4
Sonoma	4
TOTAL	11

## RIVERSIDE AND VICINITY

County of Practice	Frequency
Riverside	16
San Bernardino	20
TOTAL	36

## SACRAMENTO VALLEY

County of Practice	Frequency
Butte	3
Sacramento	16
Yolo	2
Yuba	1
TOTAL	22

## SAN DIEGO COUNTY AND VICINITY

County of Practice	Frequency
Imperial	1
San Diego	32
TOTAL	33

## SAN FRANCISCO BAY AREA

County of Practice	Frequency
Alameda	7
Contra Costa	6
Marin	1
Napa	4
San Francisco	14
San Mateo	3
Santa Clara	12
Santa Cruz	3
Solano	3
TOTAL	53

## SAN JOAQUIN VALLEY

County of Practice	Frequency
Fresno	5
Kern	4
Merced	1
San Joaquin	5
Stanislaus	5
Tulare	1
TOTAL	21

## SHASTA-CASCADE

County of Practice	Frequency
Lassen	1
Plumas	1
Shasta	2
Siskiyou	1
TOTAL	5

## SIERRA MOUNTAIN VALLEY

County of Practice	Frequency
Calaveras	1
El Dorado	2
Nevada	1
Placer	1
Tuolumne	1
TOTAL	6

## SOUTH COAST AND CENTRAL COAST

County of Practice	Frequency
San Luis Obispo	3
Santa Barbara	3
Ventura	10
TOTAL	16

**APPENDIX B | CRITICALITY INDICES FOR ALL TASKS BY CONTENT AREA**

## Content Area 1. REPORTING PROCEEDINGS

Tasks	Frequency	Importance	Criticality
T8. Use speaker identification in the transcript to attribute statements made on the record.	4.88	4.91	23.99
T9. Report proceedings to make an accurate transcription and comply with protocols and procedures.	4.84	4.92	23.93
T6. Use stenographic or voice-writing equipment with the fluency and speed required to capture verbatim testimony and make an accurate transcription.	4.63	4.73	22.99
T1. Set up equipment according to guidelines to prepare for reporting in-person and remote proceedings.	4.30	4.56	20.63
T3. Obtain all parties' names and contact information from a variety of sources to facilitate transcript production and distribution.	4.23	4.41	19.59
T10. Report interpreted proceedings to make an accurate transcription and comply with protocols and procedures.	3.91	4.62	18.98
T4. Control the proceedings according to statutes and regulations to ensure verbatim records.	3.98	4.53	18.95
T7. Use computer-aided transcription (CAT) software and equipment according to guidelines to provide realtime translation and onsite and remote streaming.	3.83	3.89	17.62
T14. Read back proceedings as requested.	3.46	4.51	16.1
T2. Obtain information from the court calendar or case caption from the court website to aid in transcript preparation.	3.32	3.40	14.4
T13. Cease and resume the reporting of proceedings as required by statutes and CRB Best Practices.	3.14	3.63	14.2

<b>Tasks</b>	<b>Frequency</b>	<b>Importance</b>	<b>Criticality</b>
T5. Administer the oath to witnesses and interpreters according to statutes and CRB Best Practices.	2.56	2.91	12.06
T12. Flag portions of proceedings requiring further clarification.	2.72	3.38	11.21
T11. Mark exhibits introduced for identification during proceedings and inclusion in the record.	2.24	2.73	10.24



## Content Area 2. TRANSCRIBING PROCEEDINGS

Tasks	Frequency	Importance	Criticality
T15. Prepare transcripts of proceedings from translated stenographic notes to create an official record.	4.65	4.88	22.97
T16. Create cover, appearance, index, and certificate pages according to CRB Best Practices to conform to statutes.	4.71	4.78	22.68
T18. Punctuate transcripts within Board-approved guidelines to accurately reflect the proceedings.	4.74	4.66	22.43
T17. Maintain current stenographic or voice writing dictionaries to facilitate transcript production.	4.63	4.58	21.52
T20. Ensure that transcripts meet regulatory requirements and jurisdictional rules to aid in administration of justice.	4.48	4.62	21.41
T19. Maintain confidentiality of transcripts in accordance with statutes and CRB Best Practices.	4.30	4.75	20.85

### Content Area 3. RESEARCH AND LANGUAGE SKILLS\*

Tasks	Frequency	Importance	Criticality
T23. Proofread transcripts according to CRB Best Practices to ensure the absence of errors in spelling, typography, and word usage (e.g., homonym-type errors).	4.72	4.77	22.66
T22. Proofread transcripts for correct punctuation according to CRB Best Practices to ensure a verbatim record of proceedings.	4.70	4.74	22.46
T25. Research the spelling of medical, legal, and technical terminology used during proceedings to ensure accuracy.	4.22	4.60	19.68
T27. Maintain English grammar knowledge to assist in accurately capturing and transcribing verbatim proceedings.	4.26	4.39	19.22
T24. Research obscure or unfamiliar terms mentioned during proceedings to ensure accuracy.	4.17	4.53	19.15
T26. Maintain vocabulary knowledge with general terminology to assist in accurately capturing and transcribing verbatim proceedings.	4.24	4.35	18.91
T21. Research citations stated on the record using authoritative research resources to ensure that information is correct.	3.12	3.91	13.47

\*Text in blue was changed from “ensure verbatim records” to “ensure a verbatim record” during workshop.

#### Content Area 4. TRANSCRIPT MANAGEMENT\*

Tasks	Frequency	Importance	Criticality
T34. Retain stenographic or voice notes of proceedings to ensure security and accessibility according to statute.	4.60	4.58	21.69
T28. Prepare electronic files of transcripts for secure electronic delivery when requested or required.	4.36	4.39	20.11
T32. Prepare and deliver certified transcripts when requested or required by code.	3.47	3.83	16.52
T29. Affix an electronic signature to reporter's certificate according to court protocols and local practices for transcripts delivered electronically.	3.51	3.93	15.82
T36. Prepare bills for products and services in accordance with applicable statutes.	3.10	3.43	13.8
T30. Fulfill requests for rough draft transcripts pursuant to statutes and CRB Best Practices.	2.63	3.38	10.68
T35. Deliver stenographic notes to the court when required.	1.95	2.72	8.65
T33. Maintain custody of deposition exhibits according to CRB Best Practices for production of transcripts and distribution upon completion.	1.65	2.25	7.59
T31. Notify deponent when transcripts are ready for review and signature by sending written notice pursuant to statutes and applicable standards.	0.84	1.45	3.85

\*Text in blue was changed from "invoices" to "bills" during workshop.

## Content Area 5. ETHICS\*

Tasks	Frequency	Importance	Criticality
T38. Practice and apply impartiality and confidentiality in accordance with statutes and regulations.	4.69	4.79	22.67
T37. Perform the tasks required of CSRs in accordance with scope of practice.	4.70	4.75	22.58
T39. Practice and apply state and local rules of court and applicable statutes and CRB Best Practices.	4.38	4.49	20.82
T40. Use backup audio media (BAM) in accordance with laws, regulations, and CRB Best Practices.	4.25	4.02	18.03

\*Text in blue was added in workshop.

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**APPENDIX C | KNOWLEDGE IMPORTANCE RATINGS BY CONTENT AREA**

## Content Area 1. REPORTING PROCEEDINGS\*

Knowledge Statements	Importance
K6. Knowledge of stenographic or voice-writing equipment operation and maintenance to facilitate verbatim reporting.	3.78
K16. Knowledge of how to operate stenographic or voice-writing equipment at the speed required.	3.74
K11. Knowledge of methods to <a href="#">stenographically or via voice notes</a> identify multiple speakers to accurately attribute statements.	3.73
K5. Knowledge of the capabilities of computer-aided transcription (CAT) software and hardware, and of how to use it.	3.66
K12. Knowledge that the stenographic or voice notes are the official record.	3.63
K4. Knowledge of the reporter's duties in court or deposition proceedings according to the statutes, regulations, and CRB Best Practices.	3.55
K18. Knowledge of when follow-up clarification is required to ensure accuracy of the record.	3.55
K3. Knowledge of methods to identify parties for the record.	3.55
K17. Knowledge of how to assert control during proceedings to ensure accuracy of the record.	3.54
K13. Knowledge of statutes and CRB Best Practices pertaining to when to go on and off the record during proceedings.	3.47
K14. Knowledge of protocols and procedures for reporting proceedings conducted through an interpreter.	3.47
K9. Knowledge of procedures for reading stenographic or voice notes aloud when requested in proceedings.	3.46
K22. Knowledge of how to operate the stenographic or voice-writing equipment to flag proceedings at the speed required.	2.94
K2. Knowledge of methods to obtain case caption information.	2.88
K19. Knowledge of equipment required to provide realtime translation and onsite and remote streaming.	2.83
K21. Knowledge of CRB Best Practices for Videoconferences and Remote Reporting regarding equipment and technology.	2.33
K20. Knowledge of relevant statutes regarding the provision of realtime translation.	2.32
K10. Knowledge of CRB Best Practices for Reporter Conduct Read-back in the Jury Room and protocol and methods of identifying court testimony that may not be read back.	2.16

## Content Area 1. REPORTING PROCEEDINGS, continued\*

Knowledge Statements	Importance
K7. Knowledge of the procedures regarding marking of exhibits to ensure identification in the in-person and remote environment.	2.13
K15. Knowledge of CRB Best Practices for Interpreted Depositions.	2.13
K8. Knowledge of CRB Best Practices for Exhibit Handling for Depositions.	1.85
K1. Knowledge of the information provided in the court calendar.	1.83

\*NOTE: Wording in blue was changed from "to stenographically or via voice notes identify multiple speakers" to "to identify multiple speakers stenographically or via voice notes" during workshop to make the statement clearer.

## Content Area 2. TRANSCRIBING PROCEEDINGS

Knowledge Statements	Importance
K24. Knowledge of the capabilities of court reporting software and how to apply it to produce transcripts of proceedings.	3.58
K36. Knowledge of backing up, maintenance, and archival of stenographic dictionaries.	3.57
K35. Knowledge of rules of punctuation.	3.55
K30. Knowledge of basic computer operating functions and capabilities.	3.52
K26. Knowledge of transcript certificate page requirements.	3.48
K27. Knowledge of transcript cover page requirements.	3.44
K25. Knowledge of Minimum Transcript Format Standards requirements.	3.42
K31. Knowledge of statutes and CRB Best Practices pertaining to formatting and production of transcripts of confidential proceedings.	3.33
K28. Knowledge of use of caption information in transcript preparation.	3.20
K23. Knowledge of the procedures for creating an exhibit index.	3.18
K32. Knowledge of conditions that require redaction in the transcript.	2.92
K34. Knowledge of Board-recommended formatting distinctions between rough drafts and certified copies.	2.89
K29. Knowledge of methods and procedures for producing indices in a record on appeal.	2.24
K33. Knowledge of transcript production requirements in death penalty cases.	1.80



### Content Area 3. RESEARCH AND LANGUAGE SKILLS

Knowledge Statements	Importance
K41. Knowledge of how to recognize and correct homonym-type errors.	3.55
K40. Knowledge of methods to research obscure or unfamiliar terminology and spelling.	3.50
K45. Knowledge of rules of English grammar.	3.49
K42. Knowledge of how to recognize and correct word usage errors.	3.48
K37. Knowledge of legal terminology and spelling.	3.39
K38. Knowledge of medical terminology and spelling.	3.27
K39. Knowledge of technical terminology and spelling.	3.24
K44. Knowledge of research methods to verify citations.	3.03
K47. Knowledge of authoritative research resources used to proofread transcripts.	2.94
K46. Knowledge of case citation formats.	2.85

#### Content Area 4. TRANSCRIPT MANAGEMENT\*

Knowledge Statements	Importance
K49. Knowledge of backing up, <b>maintenance, and archival</b> of stenographic or voice notes.	3.58
K51. Knowledge of time limits required to produce and deliver finished transcripts.	3.47
K50. Knowledge of statute pertaining to maintenance and disposition of stenographic or voice notes.	3.30
K52. Knowledge of methods to produce electronic files.	3.24
K53. Knowledge of methods to protect and secure electronic documents.	3.03
K57. Knowledge of privacy issues related to transcript production.	2.89
K54. Knowledge of methods to electronically sign documents.	2.70
K61. Knowledge of CRB Best Practices Rough Draft Transcripts and methods to electronically produce rough draft transcripts.	2.65
K60. Knowledge of methods to deliver certified transcripts.	2.62
K62. Knowledge of methods to deliver rough draft transcripts.	2.57
K55. Knowledge of requirements pertaining to the filing of sealed court transcripts.	2.41
K59. Knowledge of statutes and regulations regarding the sale of CSR products and services.	2.28
K48. Knowledge of the procedures for handling exhibits in-person and in a remote environment to ensure safekeeping and distribution.	1.95
K58. Knowledge of codes pertaining to the reading and signing of a transcript by the witness.	1.82
K56. Knowledge of how to copy and attach exhibits to original transcripts and certified copies of transcripts.	1.32

\*Note: Wording in blue was changed from "maintaining, and archiving" to "maintenance, and archival" during workshop.

## Content Area 5. ETHICS\*

Knowledge Statements	Importance
K66. Knowledge of requirements to act impartially and remain neutral toward all parties to a proceeding.	3.66
K67. Knowledge of the Professional Standards of Practice for Certified Shorthand Reporters.	3.50
K69. Knowledge of laws, <a href="#">regulations</a> , and CRB Best Practices concerning off-the-record or protected discussions.	3.22
K63. Knowledge of statutes and regulations requiring confidentiality of proceedings.	3.21
K70. Knowledge of BPC sections related to CSRs.	3.20
K68. Knowledge of laws and regulations pertaining to disclosure of conflicts of interest.	3.20
K71. Knowledge of use of backup audio media (BAM) according to CRB Best Practices.	3.09
K64. Knowledge of notification requirements when a party to the proceeding requests any part or form of a transcript.	2.82
K65. Knowledge of requirements when a third party requests any part of a transcript.	2.78
K72. Knowledge of statute regarding court reporting firm registration and applicable duties of the CSR related to the statute.	1.82

\*Text in blue was added in workshop.

**APPENDIX D | LETTERS TO PRACTITIONERS**

November 9, 2022

FirstName LastName

Street Address

City, STATE ZipCode

Dear Licensee:

The Court Reporters Board (CRB) is currently conducting an occupational analysis of the certified shorthand reporter (CSR) profession in California. An occupational analysis is a comprehensive study of the profession and uses a survey questionnaire to determine the important tasks necessary for CSRs as well as the knowledge required to perform those tasks.

You have been randomly selected to complete our occupational analysis survey. The CRB understands that your time is valuable, and your input is greatly appreciated in this vital process.

The occupational analysis survey is available online at <https://www.surveymonkey.com/r/CSR2022OA>

For your convenience, you do not have to complete the survey in a single session. You can resume where you stopped as long as you reopen the survey from the same computer and use the same browser. Before you exit, complete the page that you are on. The program will save responses only on completed pages. The weblink is available 24 hours a day, 7 days a week.

Your responses will be kept confidential. They will not be tied to your license or personal information. Individual responses will be combined with responses of other CSRs, and only group data will be analyzed.

Results of the occupational analysis will provide the CRB with information regarding the skills and knowledge of CSRs. We will use this information to ensure that the CSR examinations reflect current practice. Additionally, the competencies identified during the study will provide the basis for development of CSR license examinations in the future.

The survey is available until December 7, 2022. Thank you in advance for sharing your valuable experience with the CRB.

Sincerely,



YVONNE K. FENNER  
Executive Officer

December 7, 2022

FirstName LastName  
Street Address  
City, STATE ZipCode

Dear Licensee:

The Court Reporters Board (CRB) is currently conducting an occupational analysis of the certified shorthand reporter (CSR) profession in California. An occupational analysis is a comprehensive study of the profession and uses a survey questionnaire to determine the important tasks necessary for CSRs as well as the knowledge required to perform those tasks.

You have been randomly selected to complete our occupational analysis survey. The CRB understands that your time is valuable, and your input is greatly appreciated in this vital process.

The occupational analysis survey is available online at  
<https://www.surveymonkey.com/r/CSR2022OA>

For your convenience, you do not have to complete the survey in a single session. You can resume where you stopped as long as you reopen the survey from the same computer and use the same browser. Before you exit, complete the page that you are on. The program will save responses only on completed pages. The weblink is available 24 hours a day, 7 days a week.

Your responses will be kept confidential. They will not be tied to your license or personal information. Individual responses will be combined with responses of other CSRs, and only group data will be analyzed.

Results of the occupational analysis will provide the CRB with information regarding the skills and knowledge of CSRs. We will use this information to ensure that the CSR examinations reflect current practice. Additionally, the competencies identified during the study will provide the basis for development of CSR license examinations in the future.

The survey is available until January 6, 2023. Thank you in advance for sharing your valuable experience with the CRB.

Sincerely,



YVONNE K. FENNER  
Executive Officer

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APPENDIX E | QUESTIONNAIRE





## Certified Shorthand Reporter OA Survey 2022

**COURT REPORTERS BOARD**  
OF CALIFORNIA

### Message from the Court Reporters Board of California

Dear Licensed Certified Shorthand Reporter:

Thank you for opening this online survey. You have been selected to participate in an occupational analysis of the certified shorthand reporter (CSR) profession by the Court Reporters Board (CRB). CRB is collecting information on the tasks currently performed by CSRs in California, the importance of the tasks, and the knowledge needed to perform the tasks safely and effectively. We will use this information to ensure that the CSR examinations reflect current practice in California.

We worked with a group of CSRs to develop a survey to capture this information. The survey should take less than an hour to complete.

For your convenience, you do not have to complete the survey in a single session. You can resume where you stopped as long as you reopen the survey from the same computer and use the same browser. Before you exit, complete the page that you are on. The program will save responses only on completed pages. The weblink is available 24 hours a day, 7 days a week.

Your responses will be kept confidential. They will not be tied to license or personal information. Individual responses will be combined with responses from other CSRs, and only group data will be analyzed.

If you have questions or need assistance with the survey, please contact Maria Avalos with the Office of Professional Examination Services at [maria.avalos@dca.ca.gov](mailto:maria.avalos@dca.ca.gov).

To begin the survey, click "**Next**". Please submit your completed survey by **January 6, 2023**

We appreciate your time!

Thank you!

Court Reporters Board



Part I - Personal Data

**Complete this survey only if you are currently licensed and have worked as a CSR in California within the last 12 months.**

The Board recognizes that every certified shorthand reporter may not perform all of the tasks and use all the knowledge contained in this survey. However, your participation is essential to the success of this study.

The information you provide here is voluntary and confidential. It will be treated as personal information subject to the Information Practices Act (Civil Code section 1798 et seq.) and will be used only for the purpose of analyzing the data from this survey.

\* 1. Are you currently employed as a CSR in California?

- Yes
- No

2. Are you interested in participating in exam development workshops in the future? If yes, please also provide your name and email address in questions #3 and #4.

- Yes
- No

3. What is your name? (Only share this information if you would like to participate in exam development workshops, your responses to the survey will not be associated with your name.)

4. What is your email address? (Only share this information if you would like to participate in exam development workshops, your responses to the survey will not be associated with your email address.)



Part I - Personal Data

5. How would you describe your primary work classification?

- Official court reporter
- Freelance reporter
- Captioner/CART provider
- Other (please specify)

6. How would you describe your primary work environment?

- Court system
- Remote
- In-person
- Other (please specify)

7. How many years have you worked as a CSR in California?

- 0 to 5 years
- 6 to 10 years
- 11 to 20 years
- More than 20 years

8. On average, how many hours per week do you spend reporting and producing transcripts?

- 0 to 9 hours
- 10 to 19 hours
- 20 to 29 hours
- 30 to 39 hours
- 40 or more hours

9. In which of the following venues do you spend the majority of your time working as a CSR?

- Depositions
- Federal Court
- Superior Court
- Other (please specify)

10. Do you use persons to assist you in scoping, proofreading or binding?

- Yes
- No

11. If yes, indicate what type of services you use. (Check all that apply.)

- Scopist
- Proofreader
- Agency
- Production assistant

12. What is the location of your primary work setting?

- Urban (more than 50,000 people)
- Rural (fewer than 50,000 people)

13. What is the highest level of education you have achieved?

- Court reporting school
- Associate's degree
- Bachelor's degree
- Master's degree
- Doctorate
- Other (please specify)

14. Over the past year, which of the following types of proceedings have you worked on? (Check all that apply.)

- Administrative law
- Agriculture
- Arbitration and mediation
- Bankruptcy
- Broadcast captioning
- Business litigation
- Civil court
- Competency hearings
- Computer-assisted realtime
- Construction law
- Conventions and meetings
- Criminal court
- Discrimination
- Domestic dispute/violence
- Elder abuse/neglect
- Employment law
- Entertainment
- Environmental
- Family law

- Forensic expert
- General malpractice
- Grand jury
- Immigration
- Intellectual property
- Juvenile

- Landlord-tenant
- Law and motion
- Law enforcement
- Legal malpractice
- Legislative
- Maritime
- Medical examinations
- Medical malpractice
- Mental health
- Military law
- Oil and gas
- Patents and trademarks
- Personal injury
- Probate
- Product liability
- Public and private hearings
- Public interest
- Real estate
- Tax law
- Traffic court
- Transportation law
- Witness statements
- Workers' compensation



15. What eligibility pathway did you complete to qualify to take the California CSR examinations?

- 12 months of full-time work experience
- California-recognized court reporting school
- National Court Reporters Association (NCRA) Registered Professional Reporter (RPR) Certificate or Certificate of Merit
- California State Hearing Reporters Examination
- Reciprocity / out of state

16. Do you have any of the following NCRA certifications?

- RSR Registered Skilled Reporter
- RPR Registered Professional Reporter
- RMR Registered Merit Reporter
- RDR Registered Diplomate Reporter
- CRR Certified Realtime Reporter
- CRC Certified Realtime Captioner
- CLVS Certified Legal Video Specialist

17. Within how many years are you planning to retire or stop working as a CSR?

- 1-3 years
- 4-6 years
- 7-10 years
- Over 10 years
- Other (please specify)



Part I - Personal Data

18. What percentage of your work time is dedicated to performing the duties for the following work classifications?

Official court reporter	<input type="text"/>
Freelance reporter	<input type="text"/>
Captioner/CART provider	<input type="text"/>



Part I - Personal Data

19. In what California county do you perform most of your work?

- |                                    |                                       |                                     |
|------------------------------------|---------------------------------------|-------------------------------------|
| <input type="radio"/> Alameda      | <input type="radio"/> Marin           | <input type="radio"/> San Mateo     |
| <input type="radio"/> Alpine       | <input type="radio"/> Mariposa        | <input type="radio"/> Santa Barbara |
| <input type="radio"/> Amador       | <input type="radio"/> Mendocino       | <input type="radio"/> Santa Clara   |
| <input type="radio"/> Butte        | <input type="radio"/> Merced          | <input type="radio"/> Santa Cruz    |
| <input type="radio"/> Calaveras    | <input type="radio"/> Modoc           | <input type="radio"/> Shasta        |
| <input type="radio"/> Colusa       | <input type="radio"/> Mono            | <input type="radio"/> Sierra        |
| <input type="radio"/> Contra Costa | <input type="radio"/> Monterey        | <input type="radio"/> Siskiyou      |
| <input type="radio"/> Del Norte    | <input type="radio"/> Napa            | <input type="radio"/> Solano        |
| <input type="radio"/> El Dorado    | <input type="radio"/> Nevada          | <input type="radio"/> Sonoma        |
| <input type="radio"/> Fresno       | <input type="radio"/> Orange          | <input type="radio"/> Stanislaus    |
| <input type="radio"/> Glenn        | <input type="radio"/> Placer          | <input type="radio"/> Sutter        |
| <input type="radio"/> Humboldt     | <input type="radio"/> Plumas          | <input type="radio"/> Tehama        |
| <input type="radio"/> Imperial     | <input type="radio"/> Riverside       | <input type="radio"/> Trinity       |
| <input type="radio"/> Inyo         | <input type="radio"/> Sacramento      | <input type="radio"/> Tulare        |
| <input type="radio"/> Kern         | <input type="radio"/> San Benito      | <input type="radio"/> Tuolumne      |
| <input type="radio"/> Kings        | <input type="radio"/> San Bernardino  | <input type="radio"/> Ventura       |
| <input type="radio"/> Lake         | <input type="radio"/> San Diego       | <input type="radio"/> Yolo          |
| <input type="radio"/> Lassen       | <input type="radio"/> San Francisco   | <input type="radio"/> Yuba          |
| <input type="radio"/> Los Angeles  | <input type="radio"/> San Joaquin     |                                     |
| <input type="radio"/> Madera       | <input type="radio"/> San Luis Obispo |                                     |



## Part II - Task Ratings

### **INSTRUCTIONS FOR RATING TASK STATEMENTS**

This part of the survey contains 40 task statements. Please rate each task as it relates to your current job as a CSR.

Rate the tasks based on how often you perform the task (Frequency) and how important the task is for effective performance of your current job (Importance).

The boxes for rating the Frequency and Importance of each task have drop-down lists. Click on the "down" arrow in each box to see the rating options, and then select the value that applies to your current job. Your frequency and importance ratings should be separate and independent ratings. The ratings that you assign on one rating scale should not influence the ratings that you assign on the other rating scale.

If the task is not part of your current job, rate the task "0" (zero) frequency and "0" (zero) importance. Use the following scales to rate each task statement.

#### **FREQUENCY SCALE**

HOW OFTEN do you perform this task in your current job? Consider all of the tasks you have performed over the past year and make your judgment relative to all other tasks you perform.

0 - DOES NOT APPLY. I do not perform this task in my current job.

1 - RARELY. I perform this task the least often in my current job relative to other tasks I perform.

2 - SELDOM. I perform this task less often than most other tasks I perform in my current job.

3 - REGULARLY. I perform this task as often as other tasks I perform in my current job.

4 - OFTEN. I perform this task more often than most other tasks I perform in my current job.

5 - VERY OFTEN. This task is one of the tasks I perform most often in my current job relative to other tasks I perform.

#### **IMPORTANCE RATING**

HOW IMPORTANT are these tasks in the performance of your current job?

0 - NOT IMPORTANT; DOES NOT APPLY TO MY JOB. I do not perform this task in my current job.

1 - OF MINOR IMPORTANCE. This task is of minor importance for effective performance in my current job.

2 - FAIRLY IMPORTANT. This task is fairly important for effective performance in my current job.

3 - MODERATELY IMPORTANT. This task is moderately important for effective performance in my current job.

4 - VERY IMPORTANT. This task is very important for effective performance in my current job.

5 - CRITICALLY IMPORTANT. This task is extremely important for effective performance in my current job.



Part II - Task Ratings

1. Reporting Proceedings

20. Please rate the following tasks based on how often you perform the task (Frequency) and how important the task is for effective performance of your current job (Importance).

	Frequency	Importance
T1. Set up equipment according to guidelines to prepare for reporting in-person and remote proceedings.	<input type="text"/>	<input type="text"/>
T2. Obtain information from the court calendar or case caption from the court website to aid in transcript preparation.	<input type="text"/>	<input type="text"/>
T3. Obtain all parties' names and contact information from a variety of sources to facilitate transcript production and distribution.	<input type="text"/>	<input type="text"/>
T4. Control the proceedings according to statutes and regulations to ensure verbatim records.	<input type="text"/>	<input type="text"/>
T5. Administer the oath to witnesses and interpreters according to statutes and CRB Best Practices.	<input type="text"/>	<input type="text"/>
T6. Use stenographic or voice writing equipment with the fluency and speed required to capture verbatim testimony and make an accurate transcription.	<input type="text"/>	<input type="text"/>
T7. Use computer-aided transcription (CAT) software and equipment according to guidelines to provide realtime translation and onsite and remote streaming.	<input type="text"/>	<input type="text"/>
T8. Use speaker identification in the transcript to attribute statements made on the record.	<input type="text"/>	<input type="text"/>
T9. Report proceedings to make an accurate transcription and comply with protocols and procedures.	<input type="text"/>	<input type="text"/>
T10. Report interpreted proceedings to make an accurate transcription and comply with protocols and procedures.	<input type="text"/>	<input type="text"/>
T11. Mark exhibits for identification introduced during proceedings and inclusion in the record.	<input type="text"/>	<input type="text"/>
T12. Flag portions of proceedings requiring further clarification.	<input type="text"/>	<input type="text"/>
T13. Cease and resume the reporting of proceedings as required by statutes and CRB Best Practices.	<input type="text"/>	<input type="text"/>
T14. Read back proceedings as requested.	<input type="text"/>	<input type="text"/>



Part II - Task Ratings

**2. Transcribing Proceedings**

21. Please rate the following tasks based on how often you perform the task (Frequency) and how important the task is for effective performance of your current job (Importance).

	Frequency	Importance
T15. Prepare transcripts of proceedings of translated stenographic notes to create an official record.	<input type="text"/>	<input type="text"/>
T16. Create cover, appearance, index, and certificate pages according to CRB Best Practices to conform to statutes.	<input type="text"/>	<input type="text"/>
T17. Maintain current stenographic or voice writing dictionaries to facilitate transcript production.	<input type="text"/>	<input type="text"/>
T18. Punctuate transcripts within Board-approved guidelines to accurately reflect the proceedings.	<input type="text"/>	<input type="text"/>
T19. Maintain confidentiality of transcripts in accordance with statutes and CRB Best Practices.	<input type="text"/>	<input type="text"/>
T20. Ensure that transcripts meet regulatory requirements and jurisdictional rules to aid in administration of justice.	<input type="text"/>	<input type="text"/>



Part II - Task Ratings

**3. Research and Language Skills**

22. Please rate the following tasks based on how often you perform the task (Frequency) and how important the task is for effective performance of your current job (Importance).

	Frequency	Importance
T21. Research citations stated on the record using authoritative research resources to ensure that information is correct.	<input type="text"/>	<input type="text"/>
T22. Proofread transcripts for correct punctuation according to CRB Best Practices to ensure verbatim records of proceedings.	<input type="text"/>	<input type="text"/>
T23. Proofread transcripts according to CRB Best Practices to ensure the absence of errors in spelling, typography, and word usage (e.g., homonym-type errors).	<input type="text"/>	<input type="text"/>
T24. Research obscure or unfamiliar terms mentioned during proceedings to ensure accuracy.	<input type="text"/>	<input type="text"/>
T25. Research the spelling of medical, legal, and technical terminology used during proceedings to ensure accuracy.	<input type="text"/>	<input type="text"/>
T26. Maintain vocabulary knowledge with general terminology to assist in accurately capturing and transcribing verbatim proceedings.	<input type="text"/>	<input type="text"/>
T27. Maintain English grammar knowledge to assist in accurately capturing and transcribing verbatim proceedings.	<input type="text"/>	<input type="text"/>





Part II - Task Ratings

**4. Transcript Management**

23. Please rate the following tasks based on how often you perform the task (Frequency) and how important the task is for effective performance of your current job (Importance).

	Frequency	Importance
T28. Prepare electronic files of transcripts for secure electronic delivery when requested or required.	<input type="text"/>	<input type="text"/>
T29. Affix an electronic signature to reporter's certificate according to court protocols and local practices for transcripts delivered electronically.	<input type="text"/>	<input type="text"/>
T30. Fulfill requests for rough draft transcripts pursuant to statutes and CRB Best Practices.	<input type="text"/>	<input type="text"/>
T31. Notify deponent when transcripts are ready for review and signature by sending written notice pursuant to statutes and applicable standards.	<input type="text"/>	<input type="text"/>
T32. Prepare and deliver certified transcripts when requested or required by code.	<input type="text"/>	<input type="text"/>
T33. Maintain custody of deposition exhibits according to CRB Best Practices for production of transcripts and distribution upon completion.	<input type="text"/>	<input type="text"/>
T34. Retain stenographic or voice notes of proceedings to ensure security and accessibility according to statute.	<input type="text"/>	<input type="text"/>
T35. Deliver stenographic notes to the court when required.	<input type="text"/>	<input type="text"/>
T36. Prepare bills for products and services in accordance with applicable statutes.	<input type="text"/>	<input type="text"/>



Part II - Task Ratings

**5. Ethics**

24. Please rate the following tasks based on how often you perform the task (Frequency) and how important the task is for effective performance of your current job (Importance).

	Frequency	Importance
T37. Perform the tasks required of CSRs in accordance with scope of practice.	<input type="text"/>	<input type="text"/>
T38. Practice and apply impartiality and confidentiality in accordance with statutes and regulations.	<input type="text"/>	<input type="text"/>
T39. Practice and apply state and local rules of court and applicable statutes and CRB Best Practices.	<input type="text"/>	<input type="text"/>
T40. Use backup audio media (BAM) in accordance with laws and CRB Best Practices.	<input type="text"/>	<input type="text"/>



Part III - Knowledge Ratings

**INSTRUCTIONS FOR RATING KNOWLEDGE STATEMENTS**

This part of the survey contains 79 knowledge statements. Please rate each of the knowledge statements based on how important the knowledge is to effective performance in your current job. If a knowledge statement is NOT part of your current job, then rate it "0" (zero) for importance.

Select a rating based on your current job.

**IMPORTANCE RATING**

HOW IMPORTANT is this knowledge in the effective performance of your current job? Use the following scale to make your ratings.

- 0 - DOES NOT APPLY TO MY JOB; NOT REQUIRED. This knowledge is not required to perform my current job.
- 1 - OF MINOR IMPORTANCE. This knowledge is of minor importance for effective performance of my current job.
- 2 - FAIRLY IMPORTANT. This knowledge is fairly important for effective performance of my current job.
- 3 - MODERATELY IMPORTANT. This knowledge is moderately important for effective performance of my current job.
- 4 - VERY IMPORTANT. This knowledge is very important for effective performance of my current job.
- 5 - CRITICALLY IMPORTANT. This knowledge is essential for effective performance of my current job.



Part III - Knowledge Ratings

1. Reporting Proceedings

25.

How important is this knowledge for effective performance of tasks in your current job?

	Does not apply to my job:					
	Not required	Of minor importance	Fairly important	Moderately important	Very important	Critically important
K1. Knowledge of the information provided in the court calendar.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K2. Knowledge of methods to obtain case caption information.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K3. Knowledge of methods to identify parties for the record.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K4. Knowledge of the reporter's duties in court or deposition proceedings according to the statutes, regulations, and CRB Best Practices.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K5. Knowledge of the capabilities of computer-aided transcription (CAT) software and hardware, and of how to use it.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K6. Knowledge of stenographic machine or voice writing equipment operation and maintenance to facilitate verbatim reporting.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K7. Knowledge of the procedures regarding marking of exhibits to ensure identification in the in-person and remote environment.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K8. Knowledge of CRB Best Practices for Exhibit Handling for Depositions.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K9. Knowledge of procedures for reading stenographic or voice notes aloud when requested in proceedings.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K10. Knowledge of CRB Best Practices for Reporter Conduct Read-back in the Jury Room and protocol and methods of identifying court testimony that may not be read back.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K11. Knowledge of methods to stenographically or	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

via voice notes identify multiple speakers to accurately attribute statements.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K12. Knowledge that the stenographic or voice notes are the official record.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K13. Knowledge of statutes and CRB Best Practices pertaining to when to go on and off the record during proceedings.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K14. Knowledge of protocols and procedures for reporting proceedings conducted through an interpreter.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K15. Knowledge of CRB Best Practices for Interpreted Depositions.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K16. Knowledge of how to operate a stenographic or voice writing equipment at the speed required.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K17. Knowledge of how to assert control during proceedings to ensure accuracy of the record.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K18. Knowledge of when follow-up clarification is required to ensure accuracy of the record.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K19. Knowledge of equipment required to provide realtime translation and onsite and remote streaming.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K20. Knowledge of relevant statutes regarding the provision of realtime translation.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K21. Knowledge of CRB Best Practices for Videoconferences and Remote Reporting regarding equipment and technology.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K22. Knowledge of how to operate the stenographic or voice writing equipment to flag proceedings at the speed required.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>



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Part III - Knowledge Ratings

**2. Transcribing Proceedings**

26.

How important is this knowledge for effective performance of tasks in your current job?

	Does not apply to my job;	Not required	Of minor importance	Fairly important	Moderately important	Very important	Critically important
K23. Knowledge of the procedures for creating an exhibit index.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K24. Knowledge of the capabilities of court reporting software and how to apply it to produce transcripts of proceedings.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K25. Knowledge of Minimum Transcript Format Standards requirements.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K26. Knowledge of transcript certificate page requirements.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K27. Knowledge of transcript cover page requirements.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K28. Knowledge of use of caption information in transcript preparation.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K29. Knowledge of methods and procedures for producing indices in a record on appeal.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K30. Knowledge of basic computer operating functions and capabilities.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K31. Knowledge of statutes and CRB Best Practices pertaining to formatting and production of transcripts of confidential proceedings.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K32. Knowledge of conditions that require redaction in the transcript.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K33. Knowledge of transcript production requirements in death penalty cases.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K34. Knowledge of Board-recommended formatting distinctions between rough drafts and certified copies.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K35. Knowledge of rules of punctuation.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K36. Knowledge of backing up, maintenance, and archival of stenographic dictionaries.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>





Part III - Knowledge Ratings

3. Research and Language Skills

27.

How important is this knowledge for effective performance of tasks in your current job?

	Does not apply to my job; Not required	Of minor importance	Fairly important	Moderately important	Very important	Critically important
K37. Knowledge of legal terminology and spelling.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K38. Knowledge of medical terminology and spelling.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K39. Knowledge of technical terminology and spelling.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K40. Knowledge of methods to research obscure or unfamiliar terminology and spelling.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K41. Knowledge of how to recognize and correct homonym-type errors.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K42. Knowledge of how to recognize and correct word usage errors.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K43. Knowledge of English language vocabulary.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K44. Knowledge of research methods to verify citations.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K45. Knowledge of rules of English grammar.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K46. Knowledge of case citation formats.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K47. Knowledge of authoritative research resources used to proofread transcripts.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>



Part III - Knowledge Ratings

**4. Transcript Management**

28.

How important is this knowledge for effective performance of tasks in your current job?

	Does not apply to my job; Not required	Of minor importance	Fairly important	Moderately important	Very important	Critically important
K48. Knowledge of the procedures for handling exhibits in-person and in a remote environment to ensure safekeeping and distribution.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K49. Knowledge of backing up, maintenance, and archival of stenographic or voice notes.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K50. Knowledge of statute pertaining to maintenance and disposition of stenographic or voice notes.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K51. Knowledge of time limits required to produce and deliver finished transcripts.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K52. Knowledge of methods to produce electronic files.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K53. Knowledge of methods to protect and secure electronic documents.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K54. Knowledge of methods to electronically sign documents.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K55. Knowledge of requirements pertaining to the filing of sealed court transcripts.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K56. Knowledge of how to copy and attach exhibits to original transcripts and certified copies of transcripts.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K57. Knowledge of privacy issues related to transcript production.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K58. Knowledge of codes pertaining to the reading and signing of a transcript by the witness.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K59. Knowledge of statutes and regulations regarding the sale of CSR products and services.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K60. Knowledge of methods to deliver certified transcripts.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K61. Knowledge of CRB Best Practices Rough Draft Transcripts and methods to electronically produce rough draft transcripts.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K62. Knowledge of methods to deliver rough draft transcripts.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>



Part III - Knowledge Ratings

5. Ethics

29.

How important is this knowledge for effective performance of tasks in your current job?

	Does not apply to my job; Not required	Of minor importance	Fairly important	Moderately important	Very important	Critically important
K63. Knowledge of statutes and regulations requiring confidentiality of proceedings.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K64. Knowledge of notification requirements when a party to the proceeding requests any part or form of a transcript.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K65. Knowledge of requirements when a third party requests any part of a transcript.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K66. Knowledge of requirements to act impartially and remain neutral toward all parties to a proceeding.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K67. Knowledge of the Professional Standards of Practice for Certified Shorthand Reporters.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K68. Knowledge of laws and regulations pertaining to disclosure of conflicts of interest.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K69. Knowledge of laws and CRB Best Practices concerning off-the-record or protected discussions.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K70. Knowledge of Business and Professions code sections related to CSRs.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K71. Knowledge of use of backup audio media (BAM) according to CRB Best Practices.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K72. Knowledge of statute regarding court reporting firm registration and applicable duties of the CSR related to the statute.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>



## Certified Shorthand Reporter OA Survey 2022

**COURT REPORTERS BOARD**  
OF CALIFORNIA

Thank you!

Thank you for taking the time to complete this survey! The Court Reporters Board values your contribution to this study.



## Enforcement Program Performance Measures

Report Period	Target	Complaints Volume	Conviction/Arrest Volume	Total Volume	Intake Time	Investigation Time	Post Investigation	Pre AG Transmittal	Post AG Transmittal	Cycle Time
2018-19, Q1, PM 1	0	32	1	33	0	0	0	0	0	0
2018-19, Q1, PM 2	10	28	0	28	0	0	0	0	0	0
2018-19, Q1, PM 3	60	28	0	28	0	0	0	0	0	0
2018-19, Q1, PM 4	540	29	0	29	0	0	0	0	0	0
2018-19, Q1, PM 7	10	28	1	29	0	0	0	0	0	0
2018-19, Q1, PM 8	10	30	0	30	0	0	0	0	0	0
2018-19, Q2, PM 1	0	32	0	32	0	0	0	0	0	0
2018-19, Q2, PM 2	10	22	0	22	0	0	0	0	0	0
2018-19, Q2, PM 3	60	32	0	32	0	0	0	0	0	0
2018-19, Q2, PM 4	540	34	0	34	0	0	0	0	0	0
2018-19, Q2, PM 7	10	24	0	24	0	0	0	0	0	0
2018-19, Q2, PM 8	10	27	0	27	0	0	0	0	0	0
2018-19, Q3, PM 1	0	30	1	31	0	0	0	0	0	0
2018-19, Q3, PM 2	10	23	0	23	0	0	0	0	0	0
2018-19, Q3, PM 3	60	21	0	21	0	0	0	0	0	0
2018-19, Q3, PM 4	540	0	0	33	0	0	0	0	0	3
2018-19, Q3, PM 7	10	0	0	28	0	0	0	0	0	3
2018-19, Q3, PM 8	10	0	0	28	0	0	0	0	0	3
2018-19, Q4, PM 1	10	0	0	29	0	0	0	0	0	3
2018-19, Q4, PM 2	10	0	0	29	0	0	0	0	0	3
2018-19, Q4, PM 3	60	0	0	30	0	0	0	0	0	3
2018-19, Q4, PM 4	540	0	0	32	0	0	0	0	0	3
2018-19, Q4, PM 7	10	0	0	22	0	0	0	0	0	3
2018-19, Q4, PM 8	10	0	0	32	0	0	0	0	0	16

## Enforcement Program Performance Measures

Report Period	Target	Complaints Volume	Conviction/Arrest Volume	Total Volume	Intake Time	Investigation Time	Post Investigation	Pre AG Transmittal	Post AG Transmittal	Cycle Time
2019-20, Q1, PM 1	10	0	0	34	0	0	0	0	0	3
2019-20, Q1, PM 2	10	0	0	24	0	0	0	0	0	3
2019-20, Q1, PM 3	60	0	0	27	0	0	0	0	0	3
2019-20, Q1, PM 4	540	0	0	31	0	0	0	0	0	3
2019-20, Q1, PM 7	10	0	0	23	0	0	0	0	0	3
2019-20, Q1, PM 8	10	0	0	21	0	0	0	0	0	3
2019-20, Q2, PM 1	60	0	0	21	0	0	0	0	0	339
2019-20, Q2, PM 2	10	0	0	15	0	0	0	0	0	165
2019-20, Q2, PM 3	60	0	0	26	0	0	0	0	0	254
2019-20, Q2, PM 4	540	0	0	22	0	0	0	0	0	89
2019-20, Q2, PM 7	10	0	0	21	0	0	0	0	0	287
2019-20, Q2, PM 8	10	0	0	17	0	0	0	0	0	285
2019-20, Q3, PM 1	60	0	0	95	0	0	0	0	0	1227
2019-20, Q3, PM 2	10	0	0	27	0	0	0	0	0	143
2019-20, Q3, PM 3	60	0	0	24	0	0	0	0	0	193
2019-20, Q3, PM 4	540	0	0	24	0	0	0	0	0	403
2019-20, Q3, PM 7	10	0	0	36	0	0	0	0	0	349
2019-20, Q3, PM 8	10	0	0	28	0	0	0	0	0	81
2019-20, Q4, PM 1	60	0	0	24	0	0	0	0	0	229
2019-20, Q4, PM 2	10	0	0	31	0	0	0	0	0	280
2019-20, Q4, PM 3	60	0	0	24	0	0	0	0	0	110
2019-20, Q4, PM 4	540	0	0	1	0	0	0	0	0	194
2019-20, Q4, PM 7	10	0	0	1	0	0	0	0	0	384
2019-20, Q4, PM 8	10	0	0	3	0	0	0	0	0	330





## Enforcement Program Performance Measures

Report Period	Target	Complaints Volume	Conviction/Arrest Volume	Total Volume	Intake Time	Investigation Time	Post Investigation	Pre AG Transmittal	Post AG Transmittal	Cycle Time
2021-22, Q1, PM 1	10	0	0	0	0	0	0	0	0	0
2021-22, Q1, PM 2	10	0	0	1	0	0	0	0	0	1
2021-22, Q1, PM 3	60	0	0	1	0	0	0	0	0	3
2021-22, Q1, PM 4	540	0	0	0	0	0	0	0	0	0
2021-22, Q1, PM 7	10	0	0	0	0	0	0	0	0	0
2021-22, Q1, PM 8	10	0	0	0	0	0	0	0	0	0
2021-22, Q2, PM 1	10	0	0	0	0	0	0	0	0	0
2021-22, Q2, PM 2	10	0	0	0	0	0	0	0	0	0
2021-22, Q2, PM 3	60	0	0	2	0	0	0	0	0	18
2021-22, Q2, PM 4	540	0	0	1	0	0	0	0	0	7
2021-22, Q2, PM 7	10	0	0	1	0	0	0	0	0	10
2021-22, Q2, PM 8	10	0	0	1	0	0	0	0	0	6
2021-22, Q3, PM 1	10	0	0	1	0	0	0	0	0	19
2021-22, Q3, PM 2	10	0	0	0	0	0	0	0	0	0
2021-22, Q3, PM 3	60	0	0	0	0	0	0	0	0	0
2021-22, Q3, PM 4	540	0	0	2	0	0	0	0	0	2
2021-22, Q3, PM 7	10	0	0	1	0	0	0	0	0	5
2021-22, Q3, PM 8	10	0	0	1	0	0	0	0	0	3

State of California  
Business, Consumer Services and Housing Agency



**COURT REPORTERS BOARD**  
OF CALIFORNIA

# Administrative Procedure Manual



Court Reporters Board of California  
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## Chapter 1. Introduction

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### Overview

The Court Reporters Board (Board) was established in 1951 by an act of the Legislature. The Board's mandate is to protect the consumers of the state. It does that by 1) regulating the minimum curriculum which court reporting schools and programs must offer, 2) administering a minimum level competency test to determine entry level abilities, and 3) disciplining licensees when necessary. In addition, the Board administers the Transcript Reimbursement Fund (TRF) which reimburses Certified Shorthand Reporters (CSRs) for providing transcripts to qualified indigent civil litigants. All the Board's activities, including the TRF, are funded from licensing and examination fees. Thus, the Board is considered a "special fund" or self-funded agency because no tax dollars from the General Fund support the Board.

Today, the Board is one of the boards, bureaus, commissions, and committees within the Department of Consumer Affairs (DCA), part of the Business, Consumer Services and Housing Agency under the aegis of the Governor. DCA is responsible for consumer protection and representation through the regulation of licensed professions that provide consumer services. While the DCA provides administrative oversight and support services, the Board has policy autonomy and sets its own policies, procedures and initiates its own regulations.

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 (Business and Professions Code (BPC) Section 8005.1).

The Board is composed of three public members and two licensees. The Governor appoints one public member and two licensees to the Board. The Speaker of the Assembly and the Senate Rules Committee each appoint one public member. All Board members serve staggered, four-year terms. Board members are paid \$100 for each day actually spent in the discharge of official duties and are reimbursed travel expenses.

Since its inception, the Board has licensed 14,055 people. Of those, approximately 6,800 have current licenses. In the profession, licensees are known as either "officials," who work in court, or "freelance," who work through court reporting agencies and report mostly depositions.

Our only office exists in Sacramento. There is an executive officer and a staff of three full-time employees and one part-time. There is an enforcement analyst, an exam/licensing analyst, a TRF/executive analyst, and a licensing technician for the Board.

### Board Responsibilities

The Board is charged with the following duties and responsibilities:

- Recognizing the schools and programs providing court reporting education
- Establishing educational requirements for admission to the examination for licensure as a Certified Shorthand Reporter

- Establishing examination requirements to ensure the competence of individuals licensed to practice court reporting in California and administering the examination
- Setting and enforcing standards for continued competency of existing licensees
- Promulgating regulations governing:
  - Procedures of the Board
  - Admission of applicants for examination for licensure as court reporters
  - Minimum standards governing the Certified Shorthand Reporters services offered or performed
- Instituting disciplinary action for violations of laws and regulations governing the practice of court reporting when warranted
- Administering the Transcript Reimbursement Fund

This procedures manual is provided to Board members as a ready reference of important laws, regulations, DCA policies and Board policies in order to guide the actions of the Board members and ensure Board effectiveness and efficiency.

### **General Rules of Conduct**

- Board members shall not speak or act for the Board without proper authorization.
- Board members shall maintain the confidentiality of non-public documents and information.
- Board members shall adequately prepare for Board responsibilities.
- Board members shall recognize the equal role and responsibilities of all Board members.
- Board members shall act fairly, be nonpartisan, impartial and unbiased in their role of protecting the public.
- Board members shall treat all applicants and licensees in a fair and impartial manner.
- Board members' actions shall serve to uphold the principle that the Board's primary mission is to protect the public.
- Board members shall not use their positions on the Board for personal, familial or financial gain.



## Chapter 2. Board Meeting Procedures

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### Board Meetings

(Business and Professions Code Section 101.7(a))

The full Board shall meet at least three times each calendar year. The Board shall meet at least once each calendar year in northern California and at least once each calendar year in southern California in order to facilitate participation by the public and its licensees.

(Board Policy and Business and Professions Code Section 8003)

The Board shall hold an annual meeting for the purpose of electing a chairperson and a vice-chairperson at the first regular meeting held after June 1 of each year.

(Government Code Section 11120 et seq. and Bagley-Keene Open Meeting Act)

The Board shall comply with the provisions of the Bagley-Keene Open Meeting Act and conduct their business in accordance with Robert's Rules of Order as long as that does not conflict with any superseding laws or regulations.

Special meetings of the Board may be held upon request of a majority of the members of the Board or upon the call of the Chair.

Notice of each meeting and the time and place thereof shall be given to each member in the manner provided by the Bagley-Keene Open Meeting Act.

### Public Attendance at Board Meetings

(Government Code Section 11120 et seq.)

Meetings are subject to all provisions of the Bagley-Keene Open Meeting Act. This act governs meetings of the state regulatory boards and meeting of committees of those boards where the committee consists of more than two members. It specifies meeting notice, agenda requirements and prohibits discussing or taking action on matters not included in the agenda.

The Bagley-Keene act stipulates that the Board is to provide adequate notice of meetings to be held to the public as well as provide an opportunity for public comment. The meeting is to be conducted in an open session, except where closed session is specifically noted.

If the agenda contains matters that are appropriate for closed session, the agenda shall cite the particular statutory section and subdivision authorizing the closed session.

### Closed Sessions at Board Meetings

(Government Code Section 11126 et seq.)

A Board may meet in a closed session to discuss: personnel matters (appointments, employment, evaluation of performances, etc.); examination matters wherein the Board prepares, approves, grades or administers examinations; matters which would constitute an invasion of privacy if discussed in an open session; administrative disciplinary matters; pending litigation; as a response to confidential final draft audit report; and, as a response to threat of criminal or terrorist activity against the personnel, property, buildings, facilities or equipment.

The Board shall disclose in the open meeting a generalization of the items to be discussed in a closed session. This can be accomplished by those items on the agenda as a closed session item.

All closed sessions must be held during a regular or special meeting (section 11128). A staff person shall be designated to attend the closed session and record the discussion topics and decisions made, which will be available only to members.

All information discussed in the closed session is confidential and must not be disclosed to outside parties.

## **Quorum**

(Business and Professions Code Section 8003)

Three of the members of the Board constitute a quorum of the Board for the transaction of business. The concurrence of a majority of those members of the Board present and voting at a meeting duly held at which a quorum is present shall be necessary to constitute an act or decision of the Board.

## **Agenda Items**

(Board Policy)

The Board chair prepares Board meeting notices and agendas. The chair may direct the Board's executive officer to prepare the Board meeting notices and draft agendas, ensuring that notifications are sent to all Board members and all persons on the Board meeting mailing lists and any other as required by law and DCA policies.

(Government Code Section 11125 et seq.)

No item shall be added to the agenda subsequent to the provision of the meeting notice. However, an agenda item may be amended and then posted on the Internet at least 10 calendar days prior to the meeting.

Items not included on the agenda may not be discussed.

## **Notice of Meetings**

(Business and Professions Code Section 101.7(a))

An agency within the department that is required to provide a written notice pursuant to Government Code Section 11125 may provide that notice by regular mail, e-mail, or both. The agency shall comply with the requester's chosen form of notice.

(Government Code Section 11120 et seq.)

According to the Opening Meeting Act, meeting notices (including agenda for Board meetings) shall be sent to persons on the Board's mailing list at least 10 calendar days in advance. The notice shall include a staff person's name, work address and work telephone number so that he or she can provide information prior to the meeting.

## **Notice of Meetings to be Posted on the Internet**

(Government Code Section 11125 et seq.)

Notice shall be given and also made available on the Internet at least 10 calendar days in advance of the meeting and shall include the name, address and telephone number of any person who can provide information prior to the meeting. However, it need not include a list of witnesses expected to appear at the meeting.

Written notices shall include the address of the Internet site where notices required by this article are available.

## **Special Meetings**

(Government Code Section 11125 et seq.)

A special meeting may be held where compliance with a 10-day meeting notice would impose a hardship or when an immediate action would be required to protect the public interest.

Notice for a special meeting must be posted on the Internet at least 48 hours prior to the meeting. Upon commencement, the Board must state the specific facts which necessitate special meeting as a finding. This finding must be adopted by a two-thirds vote; failure to adopt the finding terminates the meeting.

## **Record of Meetings**

(Business and Professions Code Section 8003)

The Board shall keep a complete record of all its proceedings.

## **Audio Recording**

(Board Policy)

The open portion of the Board meetings will be tape-recorded. The closed session of the Board meeting will not be tape recorded. Tape recording of the open meetings will be retained for 14 calendar days following the Board meeting at which the tape was made. After this time period, the tape will be erased, destroyed or taped over for some other use. The purpose of tape recording the open meetings is to ensure that the minutes as written accurately reflect the discussions and actions of the Board.

## **Meeting by Teleconferencing**

(Government Code Section 11123 et seq.)

Board Meetings held by a teleconference must comply with requirements applicable to all meetings.

The portion of the meeting that is open session must be made audible to the public present at the location specified in the meeting notice. Each teleconference meeting location must be identified in the meeting notice and agenda.

All votes taken during this meeting shall be by roll call.

## **Use of Electronic Devices During Meetings**

(Bagley-Keen Act)

Members should not text or e-mail each other during an open meeting on any matter within the Board's jurisdiction.

## **Meeting Rules**

(Board Policy)

The Board will use Robert's Rules of Order, to the extent that it does not conflict with state law (e.g., Bagley-Keene Open Meeting Act), as a guide when conducting the meetings.

## Chapter 3. Travel & Salary Policies & Procedures

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### Travel Arrangements

(DGS Memorandum MM 14-03)

All government travelers are required to make arrangements through the Department of General Services' Statewide Travel Program known as Concur Travel or CalTravelStore.

Board staff shall facilitate the making of travel arrangements.

### Out-of-State Travel

(State Administrative Manual Section 700 et seq.)

For out-of-state travel, Board members will be reimbursed for actual lodging expenses, supported by vouchers, and will be reimbursed for meal and supplemental expenses. Out-of-state travel for all persons representing the State of California is controlled and must be approved by the Governor's Office.

### Travel Claims

(State Administrative Manual Section 700 et seq. and DCA Travel Guidelines)

Rules governing reimbursement of travel expenses for Board members are the same as for management-level state staff. All expenses shall be claimed on the CalATERS Global Web site. Board staff completes the expense claims as needed. It is advisable for Board members to submit their travel expense worksheets and receipts immediately after returning from a trip and not later than two weeks following the trip.

In order for the expenses to be reimbursed, Board members shall follow the procedures contained in DCA departmental memoranda which are periodically disseminated by the Director and are provided to Board members.

### Salary Per Diem

(BPC Section 103)

Compensation in the form of salary per diem and reimbursement of travel and other related expenses for Board members is regulated by BPC Section 103.

In relevant part, this section provides for the payment of salary per diem for Board members "for each day actually spent in the discharge of official duties" and provides that the Board member "shall be reimbursed for traveling and other expenses necessarily incurred in the performance of official duties."

(Board Policy)

Board members will be paid their per diem for each actual meeting day of a Board or committee meeting. Since attendance of all Board meetings during exam days is not necessary, board members will notify staff of their availability and will be paid for each day of actual service.

## Chapter 4. Board Officers, Members & Committees

---

### Officers of the Board

(Business and Professions Code Section 8003)

At each yearly meeting, the Board shall elect from its members a chair and vice-chair.

### Election of Officers

(Board Policy)

The Board shall hold an annual meeting for the purpose of electing a chairperson and a vice-chairperson at the first regular meeting held after June 1 of each year.

### Board Members

(Business and Professions Code Section 130 and 8001)

Appointment as a Board member shall be for a term of four years expiring on June 1. Members shall hold office until the appointment and qualification of their successor or until one year has passed since the expiration of the term for which they were appointed, whichever occurs first. No person shall serve a term for more than two consecutive full terms.

The Governor shall appoint one public member and two certified members. The Senate Rules Committee and Speaker of the Assembly shall each appoint a member.

(Government Code Sections 1322 and 1774)

The grace period of the Governor-appointed members shall be no more than 60 days after the expiration of the term for which they were appointed. This code applies to positions which require Senate confirmation.

(Board Policy)

The Board adopted a policy to clearly define Board duties and responsibilities.

### Appeals Committee Appointments

(Board Policy)

The Board will appoint an Appeals Committee of five members consisting of two licensed Certified Shorthand Reporters, one English teacher with experience teaching grammar and punctuation at the Postsecondary Education level plus experience working with court reporters, the executive officer, and one grader. The determination made by the Appeals Committee will be considered the final finding of the Board. The executive officer will implement the determinations of the Appeals Committee.

## Chapter 5. Board Administration and Staff

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### **Appointment of Executive Officer**

(Business and Professions Code Sections 107 and 8005)

The Board may appoint, prescribe the duties and fix the salary of an executive officer. The Board may also employ other employees as may be necessary, subject to civil service and other provisions of the law.

(Board Policy)

The Board defines the duties and responsibilities of the executive officer by policy. The executive officer provides professional administrative assistance, manages and/or coordinates administrative activities for the Board. The executive officer is expected to exercise independent judgment, common sense and initiative in establishing efficient and effective operations consistent with Board policies and administrative guidelines established by the Board and the Department of Consumer Affairs management team.

### **Board Administration**

(DCA Reference Manual)

Board members should be concerned primarily with formulating decisions on Board policies rather than decisions concerning the means for carrying out a specific course of action. It is inappropriate for Board members to become involved in the details of program delivery. Strategies for the day-to-day management of programs, operations and staff shall be the responsibility of the executive officer. Board members should not interfere with day-to-day operations, which are under the authority of the executive officer.

### **Board Staff**

(DCA Reference Manual)

Employees of the Board, with the exception of the executive officer, are civil service employees. Their employment, pay, benefits, discipline, termination and conditions of employment are governed by a myriad of civil service laws and regulations and often by collective bargaining labor agreements. Board members shall not intervene or become involved in specific day-to-day personnel transactions.

### **Legal Counsel**

The Board's legal counsel represents the Board for litigation and accordingly for services rendered by the Office of the Attorney General. The Board's legal counsel provides "in-house" counsel.

### **Board Budget**

(Board Policy)

The executive officer maintains revenue and expense data, drafts and prepares the Board budget and any related analyses for Board approval, and implements approved budget in accordance with Board policies, program needs and legislative mandates.

## Chapter 6. Other Policies & Procedures

---

### **Materials Provided to Incoming Board Members**

(Government Code section 11121.9)

A copy of the Bagley-Keene Act must be provided to each new member upon his or her appointment.

### **Board Member Training**

(Government Code sections 11146.1)

Newly appointed Board members shall attend an ethics training course within six months of assuming office and every two years thereafter.

(Government Code sections 12950.1)

Each member shall attend at least two hours of interactive training covering sexual harassment prevention within six months of his or her appointment and every two years thereafter.

(State Administrative Manual Management Memo MM 11-04)

All State employees who drive a vehicle on official State business must successfully complete the Department of General Services approved Defensive Driver Training course at least once every four years.

(Business and Professions Code Sections 453)

Newly appointed Board members shall complete a training and orientation program provided by DCA within one year of assuming office. This one-day class will discuss Board member obligations and responsibilities.

### **Removal of Board Members**

(Business and Professions Code Sections Sections 106 and 106.5)

The Governor has the power to remove from office at any time any member of any board appointed by him or her for continued neglect of duties required by law or for incompetence or unprofessional or dishonorable conduct. The Governor may also remove from office a board member who directly or indirectly discloses examination questions to an applicant for examination for licensure.

### **Resignation of Board Members**

(Government Code Section 1750)

In the event that it becomes necessary for a Board member to resign, a letter shall be sent to the appropriate appointing authority (Governor, Senate Rules Committee or Speaker of the Assembly) with the effective date of the resignation. State law requires written notification. A copy of this letter shall also be sent to the director of DCA, the Board Chair and the executive officer.



## **Conflict of Interest**

(Government Code Section 87100)

No Board member may make, participate in making or in any way attempt to use his or her official position to influence a governmental decision in which he or she knows or has reason to know he or she has a financial interest. Any Board member who has a financial interest shall disqualify him or herself from making or attempting to use his or her official position to influence the decision. Any Board member who feels he or she is entering into a situation where there is a potential for a conflict of interest should immediately consult the executive officer or the Board's legal counsel.

## ***Ex Parte* Communications**

(Government Code Section 11430.10 et seq.)

The Government Code contains provisions prohibiting *ex parte* communications. An *ex parte* communication is a communication to the decision-maker made by one party to an enforcement action without participation by the other party. While there are specified exceptions to the general prohibition, the key provision is found in subdivision (a) of section 11430.10, which states:

“While the proceeding is pending, there shall be no communication, direct or indirect, regarding any issue in the proceeding to the presiding officer from an employee or representative of an agency that is a party or from an interested person outside the agency, without notice and an opportunity for all parties to participate in the communication.”

Board members are prohibited from an *ex parte* communication with Board enforcement staff while a proceeding is pending. Occasionally an applicant who is being formally denied licensure, or a licensee against whom disciplinary action is being taken, will attempt to directly contact Board members.

If the communication is written, the person should read only far enough to determine the nature of the communication. Once he or she realizes it is from a person against whom an action is pending, they should reseal the documents and send them to the Executive Officer.

If a Board member receives a telephone call from an applicant or licensee against whom an action is pending, he or she should immediately tell the person they cannot speak to them about the matter. If the person insists on discussing the case, he or she should be told that the Board member will be required to recuse him or herself from any participation in the matter. Therefore, continued discussion is of no benefit to the applicant or licensee.

If a Board member believes that he or she has received an unlawful *ex parte* communication, he or she should contact the executive officer.

## DEFINITIONS

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ALJ	Administrative Law Judge.
APA	Administrative Procedure Act
BPC	Business and Professions Code
Chair	Where the term “Chair” is used in this manual, it will be assumed to include “his or her designee”
CLEAR	Council on Licensure Enforcement and Regulations
CCRA	California Court Reporters Association
CSR	Certified Shorthand Reporter, also known as licensed Court Reporter
DCA	Department of Consumer Affairs
DRA	Deposition Reporters Association of California
EO	Executive Officer
GC	Government Code
NCRA	National Court Reporters Association
OAH	Office of Administrative Hearings. This state agency provides neutral judges to preside over administrative cases.
OAL	Office of Administrative Law. This state agency reviews regulation changes for compliance with the process and standards set out in law and either approves or disapproves those regulation changes.
Regulation	A standard that implements, interprets, or makes specific a statute enacted by a state agency. It is enforceable the same way as a statute.
SAM	State Administrative Manual
Statute	A law passed by the legislature.
Stipulation	A form of plea bargaining in which a disciplinary case is settled by negotiated agreement prior to hearing.



# COURT REPORTERS BOARD OF CALIFORNIA



2535 CAPITOL OAKS DRIVE, SUITE 230, SACRAMENTO, CA 95833 / PHONE: (916) 263-3660 / TOLL FREE: (877) 327-5272 / FAX: (916) 263-3664 / [COURTREPORTERSBOARD.CA.GOV](http://COURTREPORTERSBOARD.CA.GOV)

## CHECKLIST FOR THE APPLICATION FOR EXAMINATION AS A CERTIFIED SHORTHAND REPORTER

- |  |  |
|--|--|
| <ul style="list-style-type: none"> <li><input type="checkbox"/> <b>Application</b> (completed)           <ul style="list-style-type: none"> <li><input type="checkbox"/> All questions answered</li> <li><input type="checkbox"/> Application dated and signed</li> <li><input type="checkbox"/> Qualifying documents attached</li> </ul> </li> <li><input type="checkbox"/> <b>Application filing fee</b> – \$40 enclosed*</li> </ul> | <ul style="list-style-type: none"> <li><input type="checkbox"/> <b>Examination fee</b> – \$75 (\$25 per each exam) enclosed*           <ul style="list-style-type: none"> <li><input type="checkbox"/> \$25 – Dictation</li> <li><input type="checkbox"/> \$25 – English</li> <li><input type="checkbox"/> \$25 – Professional practice</li> </ul> </li> </ul> |
|--|--|

*(Submit exam fees for only the exams you want to take in the current cycle. Current cycle dates for English and Professional Practice are July–October, November–February, March–June.)*

### CALIFORNIA APPLICANTS

- SECOND COPY of the request for Live Scan Service Applicant Submission Form.

### OUT-OF-STATE APPLICANTS

- Two completed Fingerprint Cards (FD-258). Please call the Board office at (877) 327-5272, or email [Kim.Kale@dca.ca.gov](mailto:Kim.Kale@dca.ca.gov), to request Fingerprint Cards.
- Request for Exemption From Mandatory Electronic Fingerprint Submission (Live Scan) Requirement Form (BCII 9004). Please call the Board office at (877) 327-5272, or email [Kim.Kale@dca.ca.gov](mailto:Kim.Kale@dca.ca.gov), to request Exemption Form.
- Additional \$49 Fingerprint Card processing fee enclosed.\*
- Return in 8x10 inch envelope (Fingerprint Cards CANNOT be folded or bent).

- Application postmarked 30 days prior to dictation examination (if applicable).
- Send application certified mail (OPTIONAL).

**\*Submit ONE check or money order for all fees related to this application made payable to the Court Reporters Board. DO NOT SEND CASH. (A \$25 charge will be imposed for returned checks.)**

**SPECIAL NOTE:** If you qualify to sit for the dictation exam, you will receive a confirmation email from Realtime Coach after the postmark deadline for accepting applications has passed. If for any reason your application is incomplete/not accepted, you will be notified with a Rejection of Application Letter. Visit <https://courtreportersboard.ca.gov> and click “Applicants” and then scroll to “Online Skills Exam Information” for more.

If you do not have access to the internet and/or a printer, you may call the Board office at (877) 327-5272 or email [Kim.Kale@dca.ca.gov](mailto:Kim.Kale@dca.ca.gov) to request a first-time application packet.



# COURT REPORTERS BOARD OF CALIFORNIA

2535 CAPITOL OAKS DRIVE, SUITE 230, SACRAMENTO, CA 95833 / PHONE: (916) 263-3660 / TOLL FREE: (877) 327-5272 / FAX: (916) 263-3664 / [COURTREPORTERSBOARD.CA.GOV](http://COURTREPORTERSBOARD.CA.GOV)

## APPLICATION FOR EXAMINATION AS A CERTIFIED SHORTHAND REPORTER

**\*THIS APPLICATION IS FOR FIRST-TIME APPLICANTS ONLY. IF YOU HAVE ALREADY  
TAKEN THE EXAM, YOU MUST SUBMIT AN APPLICATION FOR RE-EXAMINATION.**

Cashiering Use Only:	Receipt #	Amount rec'd \$ <input type="checkbox"/> Dict <input type="checkbox"/> Eng <input type="checkbox"/> PP	Postmark date
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(PLEASE TYPE OR PRINT)

Please check appropriate box for certification method:				<input type="checkbox"/> Steno machine	<input type="checkbox"/> Voice writer
FULL NAME	Last	First	Middle		
Have you ever used any other name?				<input type="checkbox"/> No	<input type="checkbox"/> Yes ( <i>If yes, what was the name?</i> )
Mailing address				Phone ( <i>optional</i> )	
City	State	ZIP code	Alternate phone ( <i>optional</i> )		
Email address ( <i>optional</i> )		Date of birth ( <i>MM/DD/YYYY</i> )	SSN or ITIN		
Education:	Name of high school attended				
	Location (city and state)				
Did you graduate from high school?	<input type="checkbox"/> Yes	Date	<input type="checkbox"/> No		
	<input type="checkbox"/> GED	Date			

Qualifying Method (Please mark under which method you will be qualifying):

- CRB-recognized court reporting school.  
A verified certificate of satisfactory completion of a prescribed course of study or certification from a CALIFORNIA-RECOGNIZED COURT REPORTING SCHOOL evidencing equivalent proficiency and the ability to make a verbatim record of material dictated in accordance with regulations adopted by the Board contained in Title 16 of California Code of Regulations.
- Work experience – provide all necessary paperwork.
- NCRA – possession of a RPR Certificate or Certificate of Merit (Attach photocopy of original certificate which MUST include issuance date).
- NVRA – possession of a CVR Certificate (Attach photocopy of original certificate which MUST include issuance date).

(Continued on the following page)



# COURT REPORTERS BOARD OF CALIFORNIA

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Have you previously applied for the California CSR examination?

*If yes, date last examined?* Yes No

Have you ever been licensed as a shorthand reporter in this or any other state?

*If yes, what state(s)?**License #:**Issue date:* Yes No

Have you ever been licensed as a shorthand reporter under a different name?

*If yes, what name?* Yes NoHave you ever been disciplined by **ANY** licensing entity in this or any other state?*If answer is YES, what licensing entity, in what state/date?* Yes No

**I HEREBY CERTIFY under penalty of perjury under the laws of the state of California that the foregoing application and attached documents are true and correct, under the terms of the Certified Shorthand Reporters Law, with full knowledge of the fact that FRAUD OR MISREPRESENTATION ARE GROUNDS FOR DENIAL, OR SUBSEQUENT REVOCATION, OF A CERTIFICATE.**

\_\_\_\_\_  
Date\_\_\_\_\_  
Signature of Applicant**IMPORTANT:** Fee (check or money order) and any necessary documents must accompany your application.**RETURN TO:** Court Reporters Board of California, 2535 Capitol Oaks Drive, Suite 230, Sacramento, CA 95833



# COURT REPORTERS BOARD OF CALIFORNIA



2535 CAPITOL OAKS DRIVE, SUITE 230, SACRAMENTO, CA 95833 / PHONE: (916) 263-3660 / TOLL FREE: (877) 327-5272 / FAX: (916) 263-3664 / [COURTREPORTERSBOARD.CA.GOV](http://COURTREPORTERSBOARD.CA.GOV)

## NOTICE ON COLLECTION OF PERSONAL INFORMATION

### COLLECTION AND USE OF PERSONAL INFORMATION

The Court Reporters Board of the Department of Consumer Affairs collects the personal information requested on this form as authorized by Business and Professions Code, Chapter 13, Article 3 and the Information Practices Act. The Court Reporters Board uses this information principally to identify and evaluate applicants for licensure, issue and renew licenses, and enforce licensing standards set by law and regulation.

### MANDATORY SUBMISSION

Submission of the requested information is mandatory. The Court Reporters Board cannot consider your application for licensure or renewal unless you provide all of the requested information.

### ACCESS TO PERSONAL INFORMATION

You may review the records maintained by the Court Reporters Board that contain your personal information as permitted by the Information Practices Act. See below for contact information.

### POSSIBLE DISCLOSURE OF PERSONAL INFORMATION

We make every effort to protect the personal information you provide us. The information you provide, however, may be disclosed in the following circumstances:

- In response to a Public Records Act request (Government Code section 6250 and following) as allowed by the Information Practices Act (Civil Code section 1798 and following);
- To another government agency as required by state or federal law; or,
- In response to a court or administrative order, a subpoena, or a search warrant.

### CONTACT INFORMATION

For questions about this notice or access to your records, you may contact Kim Kale, Court Reporters Board, at 2535 Capitol Oaks Drive, Suite 230, Sacramento, CA 95833, by phone at (877) 327-5272 or email [Kim.Kale@dca.ca.gov](mailto:Kim.Kale@dca.ca.gov). For questions about the Department's Privacy Policy, you may contact the Department of Consumer Affairs at 1625 North Market Blvd., Sacramento, CA 95834, by phone at (800) 952-5210 or by email at [dca@dca.ca.gov](mailto:dca@dca.ca.gov).

### SOCIAL SECURITY NUMBER DISCLOSURE

Disclosure of your Social Security number is mandatory. Section 30 of the Business and Professions Code and Public Law 94-455 [42 U.S.C.A. section 405(c)(2)(C)] authorize collection of your Social Security number. Your Social Security number will be used exclusively for tax enforcement purposes, for purposes of compliance with any judgment or order for family support in accordance with section 17520 of the Family Code, or for verification of licensure or examination and where licensure is reciprocal with the requesting state. If you fail to disclose your Social Security number, you will be reported to the Franchise Tax Board, which may assess a \$100 penalty against you.

**NOTICE:** Effective July 1, 2012, the State Board of Equalization and the Franchise Tax Board may share taxpayer information with the board. You are obligated to pay your state tax obligation and your license may be suspended if the state tax obligation is not paid.



# COURT REPORTERS BOARD OF CALIFORNIA



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## CHECKLIST FOR THE APPLICATION FOR RE-EXAMINATION AS A CERTIFIED SHORTHAND REPORTER

- |   |   |
|---|---|
| <ul style="list-style-type: none"> <li><input type="checkbox"/> <b>Application</b> (completed)           <ul style="list-style-type: none"> <li><input type="checkbox"/> All questions answered</li> <li><input type="checkbox"/> Application dated and signed</li> </ul> </li> <li><input type="checkbox"/> <b>Application filing fee</b> – \$40 enclosed*<br/><i>(You are required to pay the \$40 application fee one time per three-year cycle.)</i></li> </ul> | <ul style="list-style-type: none"> <li><input type="checkbox"/> <b>Examination fee</b> – \$25 per each exam enclosed*           <ul style="list-style-type: none"> <li><input type="checkbox"/> \$25 – Dictation</li> <li><input type="checkbox"/> \$25 – English</li> <li><input type="checkbox"/> \$25 – Professional practice</li> </ul> </li> </ul> |
|---|---|

*(Submit exam fees for only the exams you want to take in the current cycle. Current cycle dates for English and Professional Practice are July–October, November–February, March–June.)*

- Application postmarked 30 days prior to dictation examination (if applicable).
- Send application via certified mail (OPTIONAL).

**\*Submit ONE check or money order for all fees related to this application made payable to the Court Reporters Board. DO NOT SEND CASH. (A \$25 charge will be imposed for returned checks.)**

**SPECIAL NOTE:** If you qualify to sit for the dictation exam, you will receive a confirmation email from Realtime Coach after the postmark deadline for accepting applications has passed. If for any reason your application is incomplete/not accepted, you will be notified with a Rejection of Application Letter. Visit <https://courtreportersboard.ca.gov> and click “Applicants” and then scroll to “Online Skills Exam Information” for more.

If you do not have access to the internet and/or printer, you may call the Board office at (877) 327-5272 or email [Kim.Kale@dca.ca.gov](mailto:Kim.Kale@dca.ca.gov) to request a re-examination application packet.



# COURT REPORTERS BOARD OF CALIFORNIA

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## APPLICATION FOR **RE-EXAMINATION** AS A CERTIFIED SHORTHAND REPORTER

<b>Cashiering Use Only:</b>	Receipt #	Amount rec'd \$ <input type="checkbox"/> Dict <input type="checkbox"/> Eng <input type="checkbox"/> PP	Postmark date
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(PLEASE TYPE OR PRINT)

Please check appropriate box for certification method:		<input type="checkbox"/> Steno machine	<input type="checkbox"/> Voice writer
FULL NAME	Last	First	Middle
Have you ever used any other name?		<input type="checkbox"/> No	<input type="checkbox"/> Yes ( <i>If yes, what was the name?</i> )
Mailing address			Phone ( <i>optional</i> )
City	State	ZIP code	Alternate phone ( <i>optional</i> )
Email address ( <i>optional</i> )	Date of birth ( <i>MM/DD/YYYY</i> )	SSN or ITIN	
Have you previously <b>applied</b> for the California CSR examination?			<input type="checkbox"/> Yes <input type="checkbox"/> No
<i>If yes, date last <b>applied</b>?</i>			
Have you received a passing grade on the California CSR test in:	English	Professional practice	Dictation/transcription
	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Date	Date	Date
Date last <b>examined</b>			
Have you ever been licensed as a shorthand reporter in this or any other state?			<input type="checkbox"/> Yes <input type="checkbox"/> No
<i>If yes, what state(s)?</i>	License #	Issue date	
Have you ever been licensed as a shorthand reporter under a different name?			<input type="checkbox"/> Yes <input type="checkbox"/> No
<i>If yes, what name?</i>			

Please attach additional paperwork if necessary.

(Continued on the following page)





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Have you ever been disciplined by **ANY** licensing entity in this or any other state?

*If answer is YES, what licensing entity, in what state/date?*

Yes

No

**I HEREBY CERTIFY under penalty of perjury under the laws of the state of California that the foregoing application and attached documents are true and correct, under the terms of the Certified Shorthand Reporters Law, with full knowledge of the fact that FRAUD OR MISREPRESENTATION ARE GROUNDS FOR DENIAL, OR SUBSEQUENT REVOCATION, OF A CERTIFICATE.**

\_\_\_\_\_

Date

\_\_\_\_\_

Signature of Applicant

**IMPORTANT:** Fee (check or money order) and any necessary documents must accompany your application.

**RETURN TO:** Court Reporters Board of California, 2535 Capitol Oaks Drive, Suite 230, Sacramento, CA 95833



# COURT REPORTERS BOARD OF CALIFORNIA



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- To another government agency as required by state or federal law; or,
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**NOTICE:** Effective July 1, 2012, the State Board of Equalization and the Franchise Tax Board may share taxpayer information with the board. You are obligated to pay your state tax obligation and your license may be suspended if the state tax obligation is not paid.

**Court Reporters Board**  
**Dictation Examination Statistics - July 2018**

School Name	Total		Overall		First Time		First Time	
	# Apps	# Pass	% Pass	% Pass	Applicants	# Pass	% Pass	% Pass
Argonaut	5	0	0.0%	0.0%	0	0	n/a	n/a
Bryan University	10	0	0.0%	0.0%	1	0	0.0%	0.0%
College of Marin	4	1	25.0%	25.0%	2	1	50.0%	50.0%
Cypress	2	1	50.0%	50.0%	2	1	50.0%	50.0%
Downey	19	2	10.5%	10.5%	5	0	0.0%	0.0%
Golden State (CLOSED)	8	0	0.0%	0.0%	1	0	0.0%	0.0%
Humphreys University	1	0	0.0%	0.0%	0	0	n/a	n/a
Sage College (CLOSED)	4	1	25.0%	25.0%	n/a	n/a	n/a	n/a
Sierra Valley (CLOSED)	14	0	0.0%	0.0%	n/a	n/a	n/a	n/a
South Coast	22	0	0.0%	0.0%	0	0	n/a	n/a
Taft	3	0	0.0%	0.0%	1	0	0.0%	0.0%
Tri-Community	5	0	0.0%	0.0%	1	0	0.0%	0.0%
West Valley	1	0	0.0%	0.0%	1	0	n/a	n/a
<b>School Total</b>	<b>98</b>	<b>5</b>	<b>5.1%</b>	<b>5.1%</b>	<b>14</b>	<b>2</b>	<b>14.3%</b>	<b>14.3%</b>
Five Plus	12	1	8.3%	8.3%	n/a	n/a	n/a	n/a
Out of State	0	0	n/a	n/a	0	0	n/a	n/a
RPR (Online School - 0)	0	0	n/a	n/a	0	0	n/a	n/a
State Hearing Reporter	0	0	n/a	n/a	0	0	n/a	n/a
Working Reporter	2	0	0.0%	0.0%	0	0	n/a	n/a
<b>TOTAL</b>	<b>112</b>	<b>6</b>	<b>5.4%</b>	<b>5.4%</b>	<b>14</b>	<b>2</b>	<b>14.3%</b>	<b>14.3%</b>

**Court Reporters Board  
Examination Statistics - Jul 1, 2018 Thru Oct 31, 2018**

**English**

School Name	Total # Apps	Overall # Pass	Overall % Pass	First Time Applicants	First Time # Pass	First Time % Pass
Argonaut	1	0	0.0%	0	0	n/a
Bryan Univerity (CLOSED)	5	2	40.0%	1	0	0.0%
College of Marin	2	1	50.0%	1	1	100.0%
Cypress	2	1	50.0%	0	0	n/a
Downey	9	6	66.7%	6	3	50.0%
Golden State (CLOSED)	2	0	0.0%	n/a	n/a	n/a
Humphreys	0	0	n/a	0	0	n/a
Sage-Moreno Valley (CLOSED)	0	0	n/a	n/a	n/a	n/a
Sierra Valley (CLOSED)	1	0	0.0%	n/a	n/a	n/a
South Coast	6	4	66.7%	4	3	75.0%
Taft	3	3	100.0%	1	1	100.0%
Tri-Community	0	0	n/a	0	0	n/a
West Valley	1	1	100.0%	1	1	100.0%
<b>SCHOOL TOTAL</b>	<b>32</b>	<b>18</b>	<b>56.3%</b>	<b>14</b>	<b>9</b>	<b>64.3%</b>
Five Plus	4	3	75.0%	n/a	n/a	n/a
O/S	0	0	n/a	0	0	n/a
RPR	4	3	75.0%	2	2	100.0%
SHR	0	0	n/a	0	0	n/a
Work	1	0	0.0%	1	0	0.0%
<b>TOTAL</b>	<b>41</b>	<b>24</b>	<b>58.5%</b>	<b>17</b>	<b>11</b>	<b>64.7%</b>

**Professional Practice**

School Name	Total # Apps	Overall # Pass	Overall % Pass	First Time Applicants	First Time # Pass	First Time % Pass
Argonaut	1	1	100.0%	1	1	100.0%
Bryan University (CLOSED)	1	0	0.0%	1	0	0.0%
College of Marin	1	1	100.0%	1	1	100.0%
Cypress	2	1	50.0%	0	0	n/a
Downey	7	3	42.9%	7	3	42.9%
Golden State (CLOSED)	0	0	n/a	0	0	n/a
Humphreys	1	1	100.0%	0	0	n/a
Sage-Moreno Valley (CLOSED)	1	1	100.0%	n/a	n/a	n/a
Sierra Valley (CLOSED)	1	0	0.0%	n/a	n/a	n/a
South Coast	4	2	50.0%	4	2	50.0%
Taft	4	4	100.0%	1	1	100.0%
Tri-Community	0	0	n/a	0	0	n/a
West Valley	1	1	100.0%	1	1	100.0%
<b>SCHOOL TOTAL</b>	<b>24</b>	<b>15</b>	<b>62.5%</b>	<b>16</b>	<b>9</b>	<b>56.3%</b>
Five Plus	4	2	50.0%	n/a	n/a	n/a
O/S	0	0	n/a	0	0	n/a
RPR	3	1	33.3%	1	0	0.0%
SHR	0	0	n/a	0	0	n/a
Work	1	0	0.0%	1	0	0.0%
<b>TOTAL</b>	<b>32</b>	<b>18</b>	<b>56.3%</b>	<b>18</b>	<b>9</b>	<b>50.0%</b>

**Court Reporters Board**  
**Dictation Examination Statistics - Nov 2018**

School Name	Total		Overall		First Time		First Time	
	# Apps	# Pass	% Pass	Applicants	# Pass	% Pass	Applicants	% Pass
Argonaut	4	1	25.0%	1	0	0.0%	0	0.0%
Bryan University (CLOSED)	9	0	0.0%	n/a	n/a	n/a	n/a	n/a
College of Marin	4	0	0.0%	0	0	n/a	0	n/a
Cypress	2	0	0.0%	0	0	n/a	0	n/a
Downey	17	0	0.0%	4	0	0.0%	0	0.0%
Golden State (CLOSED)	8	0	0.0%	n/a	n/a	n/a	n/a	n/a
Humphreys University	0	0	n/a	0	0	n/a	0	n/a
Sage College (CLOSED)	3	0	0.0%	n/a	n/a	n/a	n/a	n/a
Sierra Valley (CLOSED)	12	0	0.0%	n/a	n/a	n/a	n/a	n/a
South Coast	21	0	0.0%	4	0	0.0%	0	0.0%
Taft	4	0	0.0%	1	0	0.0%	0	0.0%
Tri-Community	5	0	0.0%	0	0	n/a	0	n/a
West Valley	1	1	100.0%	0	0	n/a	0	n/a
<b>School Total</b>	<b>90</b>	<b>2</b>	<b>2.2%</b>	<b>10</b>	<b>0</b>	<b>0.0%</b>	<b>0</b>	<b>0.0%</b>
Five Plus	10	1	10.0%	n/a	n/a	n/a	n/a	n/a
Out of State	0	0	n/a	0	0	n/a	0	n/a
RPR (Online School - 0)	2	2	100%	2	2	100.0%	2	100.0%
State Hearing Reporter	0	0	n/a	0	0	n/a	0	n/a
Working Reporter	4	0	0.0%	2	0	0.0%	0	0.0%
<b>TOTAL</b>	<b>106</b>	<b>5</b>	<b>4.7%</b>	<b>14</b>	<b>2</b>	<b>14.3%</b>	<b>2</b>	<b>14.3%</b>

**Court Reporters Board  
Examination Statistics - Nov 1, 2018 Thru Feb 28, 2019**

**English**

School Name	Total # Apps	Overall # Pass	Overall % Pass	First Time Applicants	First Time # Pass	First Time % Pass
Argonaut	2	2	100.0%	1	1	100.0%
Bryan University (CLOSED)	2	1	50.0%	1	1	100.0%
College of Marin	3	0	0.0%	2	0	0.0%
Cypress	1	1	100.0%	0	0	n/a
Downey	7	3	42.9%	5	3	60.0%
Golden State (CLOSED)	2	1	50.0%	n/a	n/a	n/a
Humphreys	0	0	n/a	0	0	n/a
South Coast	5	2	40.0%	4	2	50.0%
Taft	1	0	0.0%	1	0	0.0%
Tri-Community	0	0	n/a	0	0	n/a
West Valley	0	0	n/a	0	0	n/a
<b>SCHOOL TOTAL</b>	<b>23</b>	<b>10</b>	<b>43.5%</b>	<b>14</b>	<b>7</b>	<b>50.0%</b>
Five Plus	0	0	n/a	n/a	n/a	n/a
O/S	0	0	n/a	0	0	n/a
RPR	8	3	37.5%	7	3	42.9%
SHR	0	0	n/a	0	0	n/a
Work	0	0	n/a	0	0	n/a
<b>TOTAL</b>	<b>31</b>	<b>13</b>	<b>41.9%</b>	<b>21</b>	<b>10</b>	<b>47.6%</b>

**Professional Practice**

School Name	Total # Apps	Overall # Pass	Overall % Pass	First Time Applicants	First Time # Pass	First Time % Pass
Argonaut	0	0	n/a	0	0	n/a
Bryan University (CLOSED)	2	2	100.0%	1	1	100.0%
College of Marin	2	1	50.0%	2	1	50.0%
Cypress	1	0	0.0%	0	0	n/a
Downey	6	3	50.0%	4	3	75.0%
Golden State (CLOSED)	0	0	n/a	0	0	n/a
Humphreys	0	0	n/a	0	0	n/a
South Coast	4	3	75.0%	4	3	75.0%
Taft	1	1	100.0%	1	1	100.0%
Tri-Community	0	0	n/a	0	0	n/a
West Valley	0	0	n/a	0	0	n/a
<b>SCHOOL TOTAL</b>	<b>16</b>	<b>10</b>	<b>62.5%</b>	<b>12</b>	<b>9</b>	<b>75.0%</b>
Five Plus	0	0	n/a	n/a	n/a	n/a
O/S	0	0	n/a	0	0	n/a
RPR	9	6	66.7%	7	5	71.4%
SHR	0	0	n/a	0	0	n/a
Work	0	0	n/a	0	0	n/a
<b>TOTAL</b>	<b>25</b>	<b>16</b>	<b>64.0%</b>	<b>19</b>	<b>14</b>	<b>73.7%</b>

**Court Reporters Board**  
**Dictation Examination Statistics - Mar 2019**

School Name	Total		Overall		First Time		First Time	
	# Apps	# Pass	% Pass	Applicants	# Pass	% Pass	Applicants	% Pass
Argonaut	2	0	0.0%	0	0	n/a	n/a	n/a
Bryan University (CLOSED)	7	1	14.3%	1	1	100.0%	100.0%	100.0%
College of Marin	2	0	0.0%	0	0	0.0%	0.0%	0.0%
Cypress	2	0	0.0%	0	0	n/a	n/a	n/a
Downey	22	0	0.0%	0	0	0.0%	0.0%	0.0%
Golden State (CLOSED)	7	0	0.0%	0	n/a	n/a	n/a	n/a
Humphreys University	0	0	n/a	0	0	n/a	n/a	n/a
Sage College (CLOSED)	4	1	25.0%	1	n/a	n/a	n/a	n/a
Sierra Valley (CLOSED)	7	0	0.0%	0	n/a	n/a	n/a	n/a
South Coast	27	1	3.7%	1	1	25.0%	25.0%	25.0%
Taft	5	1	20.0%	1	0	n/a	n/a	n/a
Tri-Community	5	0	0.0%	0	0	0.0%	0.0%	0.0%
West Valley	0	0	n/a	0	0	n/a	n/a	n/a
<b>School Total</b>	<b>90</b>	<b>4</b>	<b>4.4%</b>	<b>4</b>	<b>2</b>	<b>20.0%</b>	<b>20.0%</b>	<b>20.0%</b>
Five Plus	12	0	0.0%	0	n/a	n/a	n/a	n/a
Out of State	0	0	n/a	0	0	n/a	n/a	n/a
RPR (Online School - 2)	8	3	38%	3	3	37.5%	37.5%	37.5%
State Hearing Reporter	0	0	n/a	0	0	n/a	n/a	n/a
Working Reporter	1	0	0.0%	0	0	n/a	n/a	n/a
<b>TOTAL</b>	<b>111</b>	<b>7</b>	<b>6.3%</b>	<b>7</b>	<b>5</b>	<b>27.8%</b>	<b>27.8%</b>	<b>27.8%</b>

**Court Reporters Board  
Examination Statistics - Mar 1, 2019 Thru Jun 30, 2019**

**English**

School Name	Total # Apps	Overall # Pass	Overall % Pass	First Time Applicants	First Time # Pass	First Time % Pass
Argonaut	0	0	n/a	0	0	n/a
Bryan University (CLOSED)	1	0	0.0%	n/a	n/a	n/a
College of Marin	3	2	66.7%	1	1	100.0%
Cypress	1	1	100.0%	1	1	100.0%
Downey	8	2	25.0%	3	2	66.7%
Humphreys	0	0	n/a	0	0	n/a
Sierra Valley (CLOSED)	1	0	0.0%	n/a	n/a	n/a
South Coast	7	6	85.7%	4	4	100.0%
Taft	1	0	0.0%	0	0	n/a
Tri-Community	0	0	n/a	0	0	n/a
West Valley	0	0	n/a	0	0	n/a
<b>SCHOOL TOTAL</b>	<b>22</b>	<b>11</b>	<b>50.0%</b>	<b>9</b>	<b>8</b>	<b>88.9%</b>
Five Plus	2	0	0.0%	n/a	n/a	n/a
O/S	0	0	n/a	0	0	n/a
RPR	5	3	60.0%	2	2	100.0%
SHR	0	0	n/a	0	0	n/a
Work	1	0	0.0%	1	0	0.0%
<b>TOTAL</b>	<b>30</b>	<b>14</b>	<b>46.7%</b>	<b>12</b>	<b>10</b>	<b>83.3%</b>

**Professional Practice**

School Name	Total # Apps	Overall # Pass	Overall % Pass	First Time Applicants	First Time # Pass	First Time % Pass
Argonaut	0	0	n/a	0	0	n/a
Bryan University (CLOSED)	0	0	n/a	n/a	n/a	n/a
College of Marin	1	1	100.0%	1	1	100.0%
Cypress	2	2	100.0%	1	1	100.0%
Downey	5	3	60.0%	2	1	50.0%
Humphreys	0	0	n/a	0	0	n/a
Sierra Valley (CLOSED)	0	0	n/a	n/a	n/a	n/a
South Coast	5	5	100.0%	4	4	100.0%
Taft	0	0	n/a	0	0	n/a
Tri-Community	0	0	n/a	0	0	n/a
West Valley	0	0	n/a	0	0	n/a
<b>SCHOOL TOTAL</b>	<b>13</b>	<b>11</b>	<b>84.6%</b>	<b>8</b>	<b>7</b>	<b>87.5%</b>
Five Plus	1	0	0.0%	n/a	n/a	n/a
O/S	0	0	n/a	0	0	n/a
RPR	4	3	75.0%	2	1	50.0%
SHR	0	0	n/a	0	0	n/a
Work	1	0	0.0%	1	0	0.0%
<b>TOTAL</b>	<b>19</b>	<b>14</b>	<b>73.7%</b>	<b>11</b>	<b>8</b>	<b>72.7%</b>



**Court Reporters Board**  
**Dictation Examination Statistics - Jul 2019**

School Name	Total		Overall		First Time		First Time	
	# Apps	# Pass	% Pass	Applicants	# Pass	% Pass	Applicants	% Pass
Argonaut	5	3	60.0%	3	2	66.7%		
Bryan University (CLOSED)	8	1	12.5%		n/a	n/a		
College of Marin	3	2	66.7%		1	100.0%		
Cypress	3	1	33.3%		0	0.0%		
Downey	27	8	29.6%		2	50.0%		
Golden State (CLOSED)	3	1	33.3%		n/a	n/a		
Humphreys University	0	0	n/a		0	n/a		
Sage College (CLOSED)	3	1	33.3%		n/a	n/a		
Sierra Valley (CLOSED)	5	0	0.0%		n/a	n/a		
South Coast	23	8	34.8%		4	75.0%		
Taft	3	0	0.0%		0	n/a		
Tri-Community	4	0	0.0%		0	n/a		
West Valley	0	0	n/a		0	n/a		
<b>School Total</b>	<b>87</b>	<b>25</b>	<b>28.7%</b>	<b>13</b>	<b>8</b>	<b>61.5%</b>		
Five Plus	12	1	8.3%		n/a	n/a		
Out of State	1	1	100.0%		1	100.0%		
RPR (Online School - 1)	11	9	82%		7	100.0%		
State Hearing Reporter	0	0	n/a		0	n/a		
Working Reporter	2	1	50.0%		1	100.0%		
<b>TOTAL</b>	<b>113</b>	<b>37</b>	<b>32.7%</b>	<b>22</b>	<b>17</b>	<b>77.3%</b>		

**Court Reporters Board**  
**Examination Statistics - July 1, 2019 Thru Oct 31, 2019**

**English**

School Name	Total # Apps	Overall # Pass	Overall % Pass	First Time Applicants	First Time # Pass	First Time % Pass
Argonaut	3	2	66.7%	3	2	66.7%
Bryan University (CLOSED)	3	1	33.3%	n/a	n/a	n/a
College of Marin	1	0	0.0%	0	0	n/a
Cypress	0	0	n/a	0	0	n/a
Downey	7	0	0.0%	2	0	0.0%
Humphreys	3	3	100.0%	3	3	100.0%
Sierra Valley (CLOSED)	1	0	0.0%	n/a	n/a	n/a
South Coast	6	5	83.3%	5	5	100.0%
Taft	1	1	100.0%	1	1	100.0%
Tri-Community	1	1	100.0%	1	1	100.0%
West Valley	0	0	n/a	0	0	n/a
<b>SCHOOL TOTAL</b>	<b>26</b>	<b>13</b>	<b>50.0%</b>	<b>15</b>	<b>12</b>	<b>80.0%</b>
Five Plus	0	0	n/a	n/a	n/a	n/a
O/S	2	1	50.0%	2	1	50.0%
RPR	8	3	37.5%	5	3	60.0%
SHR	0	0	n/a	0	0	n/a
Work	0	0	n/a	0	0	n/a
<b>TOTAL</b>	<b>36</b>	<b>17</b>	<b>47.2%</b>	<b>22</b>	<b>16</b>	<b>72.7%</b>

**Professional Practice**

School Name	Total # Apps	Overall # Pass	Overall % Pass	First Time Applicants	First Time # Pass	First Time % Pass
Argonaut	3	3	100.0%	3	3	100.0%
Bryan University (CLOSED)	0	0	n/a	n/a	n/a	n/a
College of Marin	0	0	n/a	0	0	n/a
Cypress	0	0	n/a	0	0	n/a
Downey	7	3	42.9%	3	1	33.3%
Humphreys	3	1	33.3%	3	1	33.3%
Sierra Valley (CLOSED)	0	0	n/a	n/a	n/a	n/a
South Coast	6	5	83.3%	5	4	80.0%
Taft	0	0	n/a	0	0	n/a
Tri-Community	1	0	0.0%	1	0	0.0%
West Valley	0	0	n/a	0	0	n/a
<b>SCHOOL TOTAL</b>	<b>20</b>	<b>12</b>	<b>60.0%</b>	<b>15</b>	<b>9</b>	<b>60.0%</b>
Five Plus	0	0	n/a	n/a	n/a	n/a
O/S	2	1	50.0%	2	1	50.0%
RPR	6	3	50.0%	5	2	40.0%
SHR	0	0	n/a	0	0	n/a
Work	1	0	0.0%	0	0	n/a
<b>TOTAL</b>	<b>29</b>	<b>16</b>	<b>55.2%</b>	<b>22</b>	<b>12</b>	<b>54.5%</b>

**Court Reporters Board**  
**Dictation Examination Statistics - Nov 2019**

School Name	Total		Overall		First Time		First Time	
	# Apps	# Pass	% Pass	Applicants	# Pass	% Pass	Applicants	% Pass
Argonaut	3	1	33.3%	1	1	100.0%	1	100.0%
Bryan University (CLOSED)	6	0	0.0%	n/a	n/a	n/a	n/a	n/a
College of Marin	2	0	0.0%	0	0	n/a	0	n/a
Cypress	1	0	0.0%	0	0	n/a	0	n/a
Downey	15	2	13.3%	2	1	50.0%	2	50.0%
Golden State (CLOSED)	5	2	40.0%	n/a	n/a	n/a	n/a	n/a
Humphreys University	3	1	33.3%	3	1	33.3%	3	33.3%
Sage College (CLOSED)	2	0	0.0%	n/a	n/a	n/a	n/a	n/a
Sierra Valley (CLOSED)	4	1	25.0%	n/a	n/a	n/a	n/a	n/a
South Coast	20	7	35.0%	5	5	100.0%	5	100.0%
Taft	8	2	25.0%	5	2	40.0%	5	40.0%
Tri-Community	4	0	0.0%	1	0	0.0%	1	0.0%
West Valley	0	0	n/a	0	0	n/a	0	n/a
<b>School Total</b>	<b>73</b>	<b>16</b>	<b>21.9%</b>	<b>17</b>	<b>10</b>	<b>58.8%</b>	<b>17</b>	<b>58.8%</b>
Five Plus	9	0	0.0%	n/a	n/a	n/a	n/a	n/a
Out of State	1	1	100.0%	1	1	100.0%	1	100.0%
RPR (Online School - 1)	5	4	80%	4	4	100.0%	4	100.0%
State Hearing Reporter	0	0	n/a	0	0	n/a	0	n/a
Working Reporter	3	0	0.0%	2	0	0.0%	2	0.0%
<b>TOTAL</b>	<b>91</b>	<b>21</b>	<b>23.1%</b>	<b>24</b>	<b>15</b>	<b>62.5%</b>	<b>24</b>	<b>62.5%</b>

**Court Reporters Board  
Examination Statistics - Nov 1, 2019 Thru Feb 29, 2020**

**English**

School Name	Total # Apps	Overall # Pass	Overall % Pass	First Time Applicants	First Time # Pass	First Time % Pass
Argonaut	1	0	0.0%	0	0	n/a
Bryan University (CLOSED)	2	2	100.0%	n/a	n/a	n/a
College of Marin	2	1	50.0%	0	0	n/a
Cypress	0	0	n/a	0	0	n/a
Downey	9	5	55.6%	4	1	25.0%
Humphreys	0	0	n/a	0	0	n/a
Sierra Valley (CLOSED)	1	1	100.0%	n/a	n/a	n/a
South Coast	3	2	66.7%	2	2	100.0%
Taft	3	2	66.7%	3	2	66.7%
Tri-Community	0	0	n/a	0	0	n/a
West Valley	0	0	n/a	0	0	n/a
<b>SCHOOL TOTAL</b>	<b>21</b>	<b>13</b>	<b>61.9%</b>	<b>9</b>	<b>5</b>	<b>55.6%</b>
Five Plus	2	0	0.0%	n/a	n/a	n/a
O/S	1	1	100.0%	1	1	100.0%
RPR	5	3	60.0%	3	1	33.3%
SHR	0	0	n/a	0	0	n/a
Work	2	0	0.0%	1	0	0.0%
<b>TOTAL</b>	<b>31</b>	<b>17</b>	<b>54.8%</b>	<b>14</b>	<b>7</b>	<b>50.0%</b>

**Professional Practice**

School Name	Total # Apps	Overall # Pass	Overall % Pass	First Time Applicants	First Time # Pass	First Time % Pass
Argonaut	0	0	n/a	0	0	n/a
Bryan University (CLOSED)	1	0	0.0%	n/a	n/a	n/a
College of Marin	0	0	n/a	0	0	n/a
Cypress	0	0	n/a	0	0	n/a
Downey	6	4	66.7%	3	2	66.7%
Humphreys	2	2	100.0%	0	0	n/a
Sierra Valley (CLOSED)	0	0	n/a	n/a	n/a	n/a
South Coast	4	4	100.0%	2	2	100.0%
Taft	4	4	100.0%	4	4	n/a
Tri-Community	1	1	100.0%	0	0	n/a
West Valley	0	0	n/a	0	0	n/a
<b>SCHOOL TOTAL</b>	<b>18</b>	<b>15</b>	<b>83.3%</b>	<b>9</b>	<b>8</b>	<b>88.9%</b>
Five Plus	2	1	50.0%	n/a	n/a	n/a
O/S	1	1	100.0%	1	1	100.0%
RPR	4	4	100.0%	3	3	100.0%
SHR	0	0	n/a	0	0	n/a
Work	2	0	0.0%	1	0	n/a
<b>TOTAL</b>	<b>27</b>	<b>21</b>	<b>77.8%</b>	<b>14</b>	<b>12</b>	<b>85.7%</b>

**Court Reporters Board**  
**Dictation Examination Statistics - Mar 2020**

School Name	Total		Overall		First Time Applicants	First Time # Pass	First Time % Pass
	# Apps	# Pass	% Pass	% Pass			
Argonaut	2	1	50.0%	0	0	n/a	
Bryan University (CLOSED)	7	0	0.0%	n/a	n/a	n/a	
College of Marin	1	0	0.0%	0	0	n/a	
Cypress	1	1	100.0%	0	0	n/a	
Downey	17	7	41.2%	4	1	25.0%	
Golden State (CLOSED)	0	0	n/a	n/a	n/a	n/a	
Humphreys University	2	0	0.0%	0	0	n/a	
Sage College (CLOSED)	2	1	50.0%	n/a	n/a	n/a	
Sierra Valley (CLOSED)	6	0	0.0%	n/a	n/a	n/a	
South Coast	14	3	21.4%	2	2	100.0%	
Taft	5	0	0.0%	2	0	0.0%	
Tri-Community	6	2	33.3%	0	0	n/a	
West Valley	0	0	n/a	0	0	n/a	
<b>School Total</b>	<b>63</b>	<b>15</b>	<b>23.8%</b>	<b>8</b>	<b>3</b>	<b>37.5%</b>	
Five Plus	14	2	14.3%	n/a	n/a	n/a	
Out of State	0	0	n/a	0	0	n/a	
RPR (Online School - 1)	4	3	75%	2	2	100.0%	
State Hearing Reporter	0	0	n/a	0	0	n/a	
Working Reporter	3	0	0.0%	0	0	n/a	
<b>TOTAL</b>	<b>84</b>	<b>20</b>	<b>23.8%</b>	<b>10</b>	<b>5</b>	<b>50.0%</b>	

**Court Reporters Board  
Examination Statistics - Mar 1, 2020 Thru Jun 30, 2020**

**English**

School Name	Total # Apps	Overall # Pass	Overall % Pass	First Time Applicants	First Time # Pass	First Time % Pass
Argonaut	1	1	100.0%	1	1	100.0%
Bryan University (CLOSED)	1	0	0.0%	n/a	n/a	n/a
College of Marin	2	1	50.0%	1	1	100.0%
Cypress	0	0	n/a	0	0	n/a
Downey	9	2	22.2%	1	0	0.0%
Humphreys	0	0	n/a	0	0	n/a
Sierra Valley (CLOSED)	0	0	n/a	n/a	n/a	n/a
South Coast	0	0	n/a	0	0	n/a
Taft	0	0	n/a	0	0	n/a
Tri-Community	0	0	n/a	0	0	n/a
West Valley	0	0	n/a	0	0	n/a
<b>SCHOOL TOTAL</b>	<b>13</b>	<b>4</b>	<b>30.8%</b>	<b>3</b>	<b>2</b>	<b>66.7%</b>
Five Plus	2	1	50.0%	n/a	n/a	n/a
O/S	0	0	n/a	0	0	n/a
RPR	5	3	60.0%	3	1	33.3%
SHR	0	0	n/a	0	0	n/a
Work	1	0	0.0%	0	0	n/a
<b>TOTAL</b>	<b>21</b>	<b>8</b>	<b>38.1%</b>	<b>6</b>	<b>3</b>	<b>50.0%</b>

**Professional Practice**

School Name	Total # Apps	Overall # Pass	Overall % Pass	First Time Applicants	First Time # Pass	First Time % Pass
Argonaut	2	1	50.0%	2	1	50.0%
Bryan University (CLOSED)	0	0	n/a	n/a	n/a	n/a
College of Marin	2	1	50.0%	1	0	0.0%
Cypress	0	0	n/a	0	0	n/a
Downey	5	2	40.0%	2	0	0.0%
Humphreys	0	0	n/a	0	0	n/a
Sierra Valley (CLOSED)	0	0	n/a	n/a	n/a	n/a
South Coast	0	0	n/a	0	0	n/a
Taft	0	0	n/a	0	0	n/a
Tri-Community	0	0	n/a	0	0	n/a
West Valley	0	0	n/a	0	0	n/a
<b>SCHOOL TOTAL</b>	<b>9</b>	<b>4</b>	<b>44.4%</b>	<b>5</b>	<b>1</b>	<b>20.0%</b>
Five Plus	2	1	50.0%	n/a	n/a	n/a
O/S	0	0	n/a	0	0	n/a
RPR	3	3	100.0%	3	3	100.0%
SHR	0	0	n/a	0	0	n/a
Work	1	0	0.0%	0	0	n/a
<b>TOTAL</b>	<b>15</b>	<b>8</b>	<b>53.3%</b>	<b>8</b>	<b>4</b>	<b>50.0%</b>

## Dictation Examination Statistics - Jul 2020

School Name	Total		Overall		First Time		First Time	
	# Apps	# Pass	% Pass	% Pass	Applicants	# Pass	% Pass	% Pass
Argonaut	2	1	50.0%	50.0%	2	1	50.0%	50.0%
Bryan University (CLOSED)	4	0	0.0%	0.0%	n/a	n/a	n/a	n/a
College of Marin	3	0	0.0%	0.0%	1	0	0.0%	0.0%
Cypress	0	0	n/a	n/a	0	0	n/a	n/a
Downey	12	0	0.0%	0.0%	1	0	0.0%	0.0%
Humphreys University	3	1	33.3%	33.3%	1	1	100.0%	100.0%
Sage College (CLOSED)	2	1	50.0%	50.0%	n/a	n/a	n/a	n/a
Sierra Valley (CLOSED)	2	0	0.0%	0.0%	n/a	n/a	n/a	n/a
South Coast	15	3	20.0%	20.0%	5	3	60.0%	60.0%
Taft	6	0	0.0%	0.0%	2	0	0.0%	0.0%
Tri-Community	4	0	0.0%	0.0%	1	0	0.0%	0.0%
West Valley	0	0	n/a	n/a	0	0	n/a	n/a
<b>School Total</b>	<b>53</b>	<b>6</b>	<b>11.3%</b>	<b>11.3%</b>	<b>13</b>	<b>5</b>	<b>38.5%</b>	<b>38.5%</b>
Five Plus	9	1	11.1%	11.1%	n/a	n/a	n/a	n/a
Out of State	1	0	n/a	n/a	1	0	0.0%	0.0%
RPR (Online School - 2)	12	10	83%	83%	11	9	81.8%	81.8%
Working Reporter	2	0	0.0%	0.0%	0	0	n/a	n/a
<b>TOTAL</b>	<b>77</b>	<b>17</b>	<b>22.1%</b>	<b>22.1%</b>	<b>25</b>	<b>14</b>	<b>56.0%</b>	<b>56.0%</b>

**Court Reporters Board  
Examination Statistics - Jul 1, 2020 Thru Oct 31, 2020**

**English**

School Name	Total		Overall		First Time		First Time	
	# Apps	# Pass	% Pass	Applicants	# Pass	% Pass	Applicants	% Pass
Argonaut	4	3	75.0%	3	2	66.7%		
College of Marin	0	0	n/a	0	0	n/a		
Cypress	0	0	n/a	0	0	n/a		
Downey	9	4	44.4%	3	2	66.7%		
Humphreys	1	1	100.0%	1	1	100.0%		
South Coast	5	4	80.0%	5	4	80.0%		
Taft	6	2	33.3%	5	2	40.0%		
Tri-Community	1	1	100.0%	1	1	100.0%		
West Valley	0	0	n/a	0	0	n/a		
<b>SCHOOL TOTAL</b>	<b>26</b>	<b>15</b>	<b>57.7%</b>	<b>18</b>	<b>12</b>	<b>66.7%</b>		
Five Plus	2	1	50.0%	n/a	n/a	n/a		
O/S	0	0	n/a	0	0	n/a		
RPR	14	13	92.9%	14	13	92.9%		
SHR	0	0	n/a	0	0	n/a		
Work	1	0	0.0%	0	0	n/a		
<b>TOTAL</b>	<b>43</b>	<b>29</b>	<b>67.4%</b>	<b>32</b>	<b>25</b>	<b>78.1%</b>		

**Professional Practice**

School Name	Total		Overall		First Time		First Time	
	# Apps	# Pass	% Pass	Applicants	# Pass	% Pass	Applicants	% Pass
Argonaut	2	2	100.0%	1	1	100.0%		
College of Marin	0	0	n/a	0	0	n/a		
Cypress	0	0	n/a	0	0	n/a		
Downey	6	1	16.7%	3	0	0.0%		
Humphreys	1	1	100.0%	1	1	100.0%		
South Coast	5	5	100.0%	5	5	100.0%		
Taft	5	1	20.0%	5	1	20.0%		
Tri-Community	1	1	100.0%	1	1	100.0%		
West Valley	0	0	n/a	0	0	n/a		
<b>SCHOOL TOTAL</b>	<b>20</b>	<b>11</b>	<b>55.0%</b>	<b>16</b>	<b>9</b>	<b>56.3%</b>		
Five Plus	2	2	100.0%	n/a	n/a	n/a		
O/S	0	0	n/a	0	0	n/a		
RPR	13	10	76.9%	13	10	76.9%		
SHR	0	0	n/a	0	0	n/a		
Work	1	0	0.0%	0	0	n/a		
<b>TOTAL</b>	<b>36</b>	<b>23</b>	<b>63.9%</b>	<b>29</b>	<b>19</b>	<b>65.5%</b>		



**Court Reporters Board**  
**Dictation Examination Statistics - Nov 2020**

School Name	Total		Overall		First Time		First Time	
	# Apps	# Pass	% Pass	Applicants	# Pass	% Pass	Applicants	% Pass
Argonaut	3	0	0.0%	1	0	0.0%	n/a	n/a
Bryan University (CLOSED)	2	0	0.0%	0	0	n/a	0	0
College of Marin	4	1	25.0%	0	0	n/a	0	0
Cypress	0	0	n/a	0	0	n/a	0	0
Downey	10	0	0.0%	n/a	n/a	n/a	n/a	n/a
Golden State (CLOSED)	1	0	0.0%	0	0	n/a	0	0
Humphreys University	2	0	0.0%	0	0	n/a	0	0
Sage College (CLOSED)	1	0	0.0%	n/a	n/a	n/a	n/a	n/a
Sierra Valley (CLOSED)	1	0	0.0%	n/a	n/a	n/a	n/a	n/a
South Coast	12	0	0.0%	2	0	0.0%	2	0
Taft	9	0	0.0%	0	0	0.0%	0	0
Tri-Community	3	0	0.0%	0	0	n/a	0	0
West Valley	1	1	100.0%	1	1	100.0%	1	1
<b>School Total</b>	<b>49</b>	<b>2</b>	<b>4.1%</b>	<b>6</b>	<b>1</b>	<b>16.7%</b>	<b>n/a</b>	<b>n/a</b>
Five Plus	10	3	30.0%	2	2	100.0%	8	7
Out of State	3	3	100.0%	1	0	0.0%	1	0
RPR	9	7	78%	17	10	58.8%		
Working Reporter	3	0	0.0%					
<b>TOTAL</b>	<b>74</b>	<b>15</b>	<b>20.3%</b>					

**Court Reporters Board  
Examination Statistics - Nov 1, 2020 Thru Feb 28, 2021**

**English**

School Name	Total # Apps	Overall # Pass	Overall % Pass	First Time Applicants	First Time # Pass	First Time % Pass
Argonaut	2	1	50.0%	2	1	50.0%
Bryan (CLOSED)	0	0	n/a	n/a	n/a	n/a
College of Marin	1	1	100.0%	0	0	n/a
Cypress	0	0	n/a	0	0	n/a
Downey	4	1	25.0%	0	0	n/a
Humphreys	0	0	n/a	0	0	n/a
Sierra Valley (CLOSED)	1	0	0.0%	n/a	n/a	n/a
South Coast	5	5	100.0%	4	4	100.0%
Taft	5	1	20.0%	3	1	33.3%
Tri-Community	0	0	n/a	0	0	n/a
West Valley	2	1	50.0%	2	1	50.0%
<b>SCHOOL TOTAL</b>	<b>20</b>	<b>10</b>	<b>50.0%</b>	<b>11</b>	<b>7</b>	<b>63.6%</b>
Five Plus	4	3	75.0%	n/a	n/a	n/a
O/S	1	1	100.0%	1	1	100.0%
RPR	8	7	87.5%	8	8	100.0%
SHR	0	0	n/a	0	0	n/a
Work	0	0	n/a	0	0	n/a
<b>TOTAL</b>	<b>33</b>	<b>21</b>	<b>63.6%</b>	<b>20</b>	<b>16</b>	<b>80.0%</b>

**Professional Practice**

School Name	Total # Apps	Overall # Pass	Overall % Pass	First Time Applicants	First Time # Pass	First Time % Pass
Argonaut	2	2	100.0%	2	2	100.0%
Bryan (CLOSED)	1	1	100.0%	n/a	n/a	n/a
College of Marin	1	1	100.0%	0	0	n/a
Cypress	0	0	n/a	0	0	n/a
Downey	3	2	66.7%	0	0	n/a
Humphreys	0	0	n/a	0	0	n/a
Sierra Valley (CLOSED)	1	1	100.0%	n/a	n/a	n/a
South Coast	4	2	50.0%	4	2	50.0%
Taft	5	2	40.0%	3	2	66.7%
Tri-Community	0	0	n/a	0	0	n/a
West Valley	1	0	0.0%	1	0	0.0%
<b>SCHOOL TOTAL</b>	<b>18</b>	<b>11</b>	<b>61.1%</b>	<b>10</b>	<b>6</b>	<b>60.0%</b>
Five Plus	4	2	50.0%	n/a	n/a	n/a
O/S	1	1	100.0%	1	1	100.0%
RPR	10	9	90.0%	7	6	85.7%
SHR	0	0	n/a	0	0	n/a
Work	0	0	n/a	0	0	n/a
<b>TOTAL</b>	<b>33</b>	<b>23</b>	<b>69.7%</b>	<b>18</b>	<b>13</b>	<b>72.2%</b>

## Court Reporters Board

### Dictation Examination Statistics - Mar 2021

School Name	Total		Overall		First Time Applicants	First Time # Pass	First Time % Pass
	# Apps	# Pass	% Pass	% Pass			
Argonaut	4	0	0.0%	1	0	0.0%	
Bryan University (CLOSED)	2	0	0.0%	n/a	n/a	n/a	
College of Marin	1	1	100.0%	0	0	n/a	
Cypress	0	0	n/a	0	0	n/a	
Downey	4	0	0.0%	0	0	n/a	
Golden State (CLOSED)	1	0	0.0%	n/a	n/a	n/a	
Humphreys University	1	0	0.0%	0	0	n/a	
Sage College (CLOSED)	0	0	n/a	n/a	n/a	n/a	
Sierra Valley (CLOSED)	3	0	0.0%	n/a	n/a	n/a	
South Coast	13	3	23.1%	3	2	66.7%	
Taft	10	1	10.0%	2	1	50.0%	
Tri-Community	6	0	0.0%	2	0	0.0%	
West Valley	2	0	0.0%	2	0	0.0%	
<b>School Total</b>	<b>47</b>	<b>5</b>	<b>10.6%</b>	<b>10</b>	<b>3</b>	<b>30.0%</b>	
Five Plus	7	3	42.9%	n/a	n/a	n/a	
Out of State	0	0	n/a	0	0	n/a	
RPR	8	6	75%	6	5	83.3%	
Working Reporter	1	0	0.0%	0	0	n/a	
<b>TOTAL</b>	<b>63</b>	<b>14</b>	<b>22.2%</b>	<b>16</b>	<b>8</b>	<b>50.0%</b>	

**Court Reporters Board  
Examination Statistics - Mar 1, 2021 Thru Jun 30, 2021**

**English**

School Name	Total # Apps	Overall # Pass	Overall % Pass	First Time Applicants	First Time # Pass	First Time % Pass
Charles A. Jones (Argonaut)	1	1	100.0%	0	0	n/a
Bryan (CLOSED)	1	1	100.0%	n/a	n/a	n/a
College of Marin	0	0	n/a	0	0	n/a
Cypress	0	0	n/a	0	0	n/a
Downey	3	0	0.0%	0	0	n/a
Humphreys	0	0	n/a	0	0	n/a
Sierra Valley (CLOSED)	1	0	0.0%	n/a	n/a	n/a
South Coast	4	4	100.0%	4	4	100.0%
Taft	5	1	20.0%	0	0	n/a
Tri-Community	2	2	n/a	2	2	100.0%
West Valley	3	3	100.0%	2	2	100.0%
<b>SCHOOL TOTAL</b>	<b>20</b>	<b>12</b>	<b>60.0%</b>	<b>8</b>	<b>8</b>	<b>100.0%</b>
Five Plus	1	1	100.0%	n/a	n/a	n/a
O/S	1	1	100.0%	1	1	100.0%
RPR	9	4	44.4%	9	4	44.4%
SHR	0	0	n/a	0	0	n/a
Work	0	0	n/a	0	0	n/a
<b>TOTAL</b>	<b>31</b>	<b>18</b>	<b>58.1%</b>	<b>18</b>	<b>13</b>	<b>72.2%</b>

**Professional Practice**

School Name	Total # Apps	Overall # Pass	Overall % Pass	First Time Applicants	First Time # Pass	First Time % Pass
Charles A. Jones (Argonaut)	0	0	n/a	0	0	n/a
Bryan (CLOSED)	0	0	n/a	n/a	n/a	n/a
College of Marin	0	0	n/a	0	0	n/a
Cypress	0	0	n/a	0	0	n/a
Downey	1	0	0.0%	0	0	n/a
Humphreys	0	0	n/a	0	0	n/a
Sierra Valley (CLOSED)	0	0	n/a	n/a	n/a	n/a
South Coast	6	5	83.3%	4	4	100.0%
Taft	5	1	20.0%	0	0	n/a
Tri-Community	2	1	50.0%	2	1	50.0%
West Valley	4	4	100.0%	3	3	100.0%
<b>SCHOOL TOTAL</b>	<b>18</b>	<b>11</b>	<b>61.1%</b>	<b>9</b>	<b>8</b>	<b>88.9%</b>
Five Plus	1	1	100.0%	n/a	n/a	n/a
O/S	1	0	0.0%	1	0	0.0%
RPR	9	5	55.6%	9	5	55.6%
SHR	0	0	n/a	0	0	n/a
Work	0	0	n/a	0	0	n/a
<b>TOTAL</b>	<b>29</b>	<b>17</b>	<b>58.6%</b>	<b>19</b>	<b>13</b>	<b>68.4%</b>

## Court Reporters Board

### Dictation Examination Statistics - Jul 2021

School Name	Total		Overall		First Time		First Time	
	# Apps	# Pass	% Pass	Applicants	# Pass	% Pass	Applicants	% Pass
Charles A. Jones (Argonaut)	4	1	25.0%	1	0	0.0%	0	0.0%
Bryan University (CLOSED)	2	0	0.0%	n/a	n/a	n/a	n/a	n/a
College of Marin	2	0	0.0%	1	0	0.0%	0	0.0%
Cypress	0	0	n/a	0	0	n/a	0	n/a
Downey	5	0	0.0%	0	0	n/a	0	n/a
Golden State (CLOSED)	0	0	n/a	n/a	n/a	n/a	n/a	n/a
Humphreys University	1	0	0.0%	0	0	n/a	0	n/a
Sage College (CLOSED)	0	0	n/a	n/a	n/a	n/a	n/a	n/a
Sierra Valley (CLOSED)	3	0	0.0%	n/a	n/a	n/a	n/a	n/a
South Coast	17	4	23.5%	5	4	80.0%	4	80.0%
Taft	6	0	0.0%	0	0	n/a	0	n/a
Tri-Community	3	0	0.0%	1	0	0.0%	0	0.0%
West Valley	3	1	33.3%	1	0	0.0%	0	0.0%
<b>School Total</b>	46	6	13.0%	9	4	44.4%	4	44.4%
Five Plus	6	2	33.3%	n/a	n/a	n/a	n/a	n/a
Out of State	0	0	n/a	0	0	n/a	0	n/a
RPR	6	4	67%	5	4	80.0%	4	80.0%
Working Reporter	1	0	0.0%	0	0	n/a	0	n/a
<b>TOTAL</b>	59	12	20.3%	14	8	57.1%	8	57.1%

**Court Reporters Board  
Examination Statistics - Jul 1, 2021 Thru Oct 31, 2021**

**English**

School Name	Total # Apps	Overall # Pass	Overall % Pass	First Time Applicants	First Time # Pass	First Time % Pass
Charles A. Jones (CLOSED)	1	0	0.0%	1	0	0.0%
Bryan (CLOSED)	0	0	n/a	n/a	n/a	n/a
College of Marin	0	0	n/a	0	0	n/a
Cypress	0	0	n/a	0	0	n/a
Downey	3	0	0.0%	0	0	n/a
Humphreys	0	0	n/a	0	0	n/a
Sierra Valley (CLOSED)	0	0	n/a	n/a	n/a	n/a
South Coast	4	3	75.0%	4	3	75.0%
Taft	3	0	0.0%	0	0	n/a
Tri-Community	0	0	n/a	0	0	n/a
West Valley	0	0	n/a	0	0	n/a
<b>SCHOOL TOTAL</b>	<b>11</b>	<b>3</b>	<b>27.3%</b>	<b>5</b>	<b>3</b>	<b>60.0%</b>
Five Plus	2	2	100.0%	n/a	n/a	n/a
O/S	0	0	n/a	0	0	n/a
RPR	11	5	45.5%	5	3	60.0%
SHR	0	0	n/a	0	0	n/a
Work	1	1	100.0%	1	1	100.0%
<b>TOTAL</b>	<b>25</b>	<b>11</b>	<b>44.0%</b>	<b>11</b>	<b>7</b>	<b>63.6%</b>

**Professional Practice**

School Name	Total # Apps	Overall # Pass	Overall % Pass	First Time Applicants	First Time # Pass	First Time % Pass
Charles A. Jones (CLOSED)	1	0	0.0%	1	0	0.0%
Bryan (CLOSED)	0	0	n/a	n/a	n/a	n/a
College of Marin	0	0	n/a	0	0	n/a
Cypress	0	0	n/a	0	0	n/a
Downey	3	1	33.3%	0	0	n/a
Humphreys	0	0	n/a	0	0	n/a
Sierra Valley (CLOSED)	0	0	n/a	n/a	n/a	n/a
South Coast	5	5	100.0%	4	4	100.0%
Taft	3	1	33.3%	0	0	n/a
Tri-Community	1	0	0.0%	0	0	n/a
West Valley	0	0	n/a	0	0	n/a
<b>SCHOOL TOTAL</b>	<b>13</b>	<b>7</b>	<b>53.8%</b>	<b>5</b>	<b>4</b>	<b>80.0%</b>
Five Plus	2	2	100.0%	n/a	n/a	n/a
O/S	1	1	100.0%	0	0	n/a
RPR	9	4	44.4%	7	3	42.9%
SHR	0	0	n/a	0	0	n/a
Work	1	0	0.0%	1	0	0.0%
<b>TOTAL</b>	<b>26</b>	<b>14</b>	<b>53.8%</b>	<b>13</b>	<b>7</b>	<b>53.8%</b>

**Court Reporters Board**  
**Dictation Examination Statistics - Nov 2021**

<b>School Name</b>	<b>Total</b>		<b>Overall</b>		<b>First Time</b>		<b>First Time</b>	
	<b># Apps</b>	<b># Pass</b>	<b># Pass</b>	<b>% Pass</b>	<b>Applicants</b>	<b># Pass</b>	<b>% Pass</b>	<b>% Pass</b>
Charles A. Jones (CLOSED)	4	0	0	0.0%	1	0	0.0%	
Bryan University (CLOSED)	1	0	0	0.0%	n/a	n/a	n/a	
College of Marin	1	0	0	0.0%	0	0	n/a	
Cypress	0	0	0	n/a	0	0	n/a	
Downey	4	0	0	0.0%	0	0	n/a	
Golden State (CLOSED)	1	0	0	n/a	n/a	n/a	n/a	
Humphreys University	1	0	0	0.0%	0	0	n/a	
Sage College (CLOSED)	0	0	0	n/a	n/a	n/a	n/a	
Sierra Valley (CLOSED)	1	0	0	0.0%	n/a	n/a	n/a	
South Coast	17	2	2	11.8%	4	1	25.0%	
Taft	6	1	1	16.7%	0	0	n/a	
Tri-Community	4	1	1	25.0%	0	0	n/a	
West Valley	2	1	1	50.0%	0	0	n/a	
<b>School Total</b>	<b>42</b>	<b>5</b>	<b>5</b>	<b>11.9%</b>	<b>5</b>	<b>1</b>	<b>20.0%</b>	
Five Plus	4	0	0	0.0%	n/a	n/a	n/a	
Out of State	0	0	0	n/a	0	0	n/a	
RPR	6	4	4	67%	5	4	80.0%	
Working Reporter	1	1	1	100.0%	1	1	100.0%	
<b>TOTAL</b>	<b>53</b>	<b>10</b>	<b>10</b>	<b>18.9%</b>	<b>11</b>	<b>6</b>	<b>54.5%</b>	

**Court Reporters Board  
Examination Statistics - Nov 1, 2021 Thru Feb 28, 2022**

**English**

School Name	Total		Overall		First Time		First Time	
	# Apps	# Pass	% Pass	Applicants	# Pass	% Pass	Applicants	% Pass
Charles A. Jones (CLOSED)	1	0	0.0%	0	0	n/a	0	n/a
College of Marin	2	1	50.0%	2	1	50.0%	1	50.0%
Cypress	0	0	n/a	0	0	n/a	0	n/a
Downey	1	1	100.0%	0	0	n/a	0	n/a
Humphreys	0	0	n/a	0	0	n/a	0	n/a
South Coast	1	1	100.0%	0	0	n/a	0	n/a
Taft	3	1	33.3%	0	0	n/a	0	n/a
Tri-Community	1	0	0.0%	1	0	0.0%	0	0.0%
West Valley	0	0	n/a	0	0	n/a	0	n/a
<b>SCHOOL TOTAL</b>	<b>9</b>	<b>4</b>	<b>44.4%</b>	<b>3</b>	<b>1</b>	<b>33.3%</b>	<b>1</b>	<b>33.3%</b>
Five Plus	1	1	100.0%	n/a	n/a	n/a	n/a	n/a
O/S	0	0	n/a	0	0	n/a	0	n/a
RPR	11	11	100.0%	8	8	100.0%	8	100.0%
SHR	0	0	n/a	0	0	n/a	0	n/a
Work	1	1	100.0%	1	1	100.0%	1	100.0%
<b>TOTAL</b>	<b>22</b>	<b>17</b>	<b>77.3%</b>	<b>12</b>	<b>10</b>	<b>83.3%</b>	<b>10</b>	<b>83.3%</b>

**Professional Practice**

School Name	Total		Overall		First Time		First Time	
	# Apps	# Pass	% Pass	Applicants	# Pass	% Pass	Applicants	% Pass
Charles A. Jones (CLOSED)	0	0	n/a	0	0	n/a	0	n/a
College of Marin	2	1	50.0%	2	1	50.0%	1	50.0%
Cypress	0	0	n/a	0	0	n/a	0	n/a
Downey	1	1	100.0%	0	0	n/a	0	n/a
Humphreys	0	0	n/a	0	0	n/a	0	n/a
South Coast	0	0	n/a	0	0	n/a	0	n/a
Taft	1	1	100.0%	0	0	n/a	0	n/a
Tri-Community	1	0	0.0%	1	0	0.0%	0	0.0%
West Valley	0	0	n/a	0	0	n/a	0	n/a
<b>SCHOOL TOTAL</b>	<b>5</b>	<b>3</b>	<b>60.0%</b>	<b>3</b>	<b>1</b>	<b>33.3%</b>	<b>1</b>	<b>33.3%</b>
Five Plus	1	1	100.0%	n/a	n/a	n/a	n/a	n/a
O/S	0	0	n/a	0	0	n/a	0	n/a
RPR	12	8	66.7%	8	7	87.5%	7	87.5%
SHR	0	0	n/a	0	0	n/a	0	n/a
Work	1	0	0.0%	0	0	0.0%	0	0.0%
<b>TOTAL</b>	<b>19</b>	<b>12</b>	<b>63.2%</b>	<b>11</b>	<b>8</b>	<b>72.7%</b>	<b>8</b>	<b>72.7%</b>



**Court Reporters Board**  
**Dictation Examination Statistics - Mar 2022**

<b>School Name</b>	<b>Total # Apps</b>	<b>Overall # Pass</b>	<b>Overall % Pass</b>	<b>First Time Applicants</b>	<b>First Time # Pass</b>	<b>First Time % Pass</b>
Charles A. Jones (CLOSED)	4	0	0.0%	0	0	n/a
College of Marin	3	1	33.3%	2	0	0.0%
Cypress	0	0	n/a	0	0	n/a
Downey	9	1	11.1%	3	1	33.3%
Humphreys University	1	0	0.0%	0	0	n/a
South Coast	12	2	16.7%	2	0	0.0%
Taft	6	0	0.0%	1	0	0.0%
Tri-Community	3	0	0.0%	0	0	n/a
West Valley	1	1	100.0%	0	0	n/a
<b>School Total</b>	<b>39</b>	<b>5</b>	<b>12.8%</b>	<b>8</b>	<b>1</b>	<b>12.5%</b>
Five Plus	13	1	7.7%	n/a	n/a	n/a
Out of State	0	0	n/a	0	0	n/a
RPR	12	9	75%	10	9	90.0%
Working Reporter	1	0	0.0%	0	0	n/a
<b>TOTAL</b>	<b>65</b>	<b>15</b>	<b>23.1%</b>	<b>18</b>	<b>10</b>	<b>55.6%</b>

**Court Reporters Board  
Examination Statistics - Mar 1, 2022 Thru Jun 30, 2022**

**English**

School Name	Total # Apps	Overall # Pass	Overall % Pass	First Time Applicants	First Time # Pass	First Time % Pass
Charles A. Jones (CLOSED)	1	0	0.0%	0	0	n/a
College of Marin	3	1	33.3%	2	1	50.0%
Cypress	0	0	n/a	0	0	n/a
Downey	5	2	40.0%	4	2	50.0%
Humphreys	3	3	100.0%	3	3	100.0%
South Coast	4	1	25.0%	4	1	25.0%
Taft	6	4	66.7%	3	2	66.7%
Tri-Community	0	0	n/a	0	0	n/a
West Valley	0	0	n/a	0	0	n/a
<b>SCHOOL TOTAL</b>	<b>22</b>	<b>11</b>	<b>50.0%</b>	<b>16</b>	<b>9</b>	<b>56.3%</b>
Five Plus	2	1	50.0%	n/a	n/a	n/a
O/S	0	0	n/a	0	0	n/a
RPR	18	9	50.0%	12	8	66.7%
SHR	0	0	n/a	0	0	n/a
Work	0	0	n/a	0	0	n/a
<b>TOTAL</b>	<b>42</b>	<b>21</b>	<b>50.0%</b>	<b>28</b>	<b>17</b>	<b>60.7%</b>

**Professional Practice**

School Name	Total # Apps	Overall # Pass	Overall % Pass	First Time Applicants	First Time # Pass	First Time % Pass
Charles A. Jones (CLOSED)	1	1	100.0%	0	0	n/a
College of Marin	3	1	33.3%	2	1	50.0%
Cypress	1	0	0.0%	1	0	0.0%
Downey	3	2	66.7%	3	2	66.7%
Humphreys	3	3	100.0%	3	3	100.0%
South Coast	4	4	100.0%	4	4	100.0%
Taft	4	3	75.0%	3	2	66.7%
Tri-Community	0	0	n/a	0	0	n/a
West Valley	0	0	n/a	0	0	n/a
<b>SCHOOL TOTAL</b>	<b>19</b>	<b>14</b>	<b>73.7%</b>	<b>16</b>	<b>12</b>	<b>75.0%</b>
Five Plus	2	1	50.0%	n/a	n/a	n/a
O/S	0	0	n/a	0	0	n/a
RPR	17	12	70.6%	11	9	81.8%
SHR	0	0	n/a	0	0	n/a
Work	2	2	100.0%	0	0	n/a
<b>TOTAL</b>	<b>40</b>	<b>29</b>	<b>72.5%</b>	<b>27</b>	<b>21</b>	<b>77.8%</b>

**Court Reporters Board**  
**Dictation Examination Statistics - Jul 2022**

School Name	Total		Overall		First Time Applicants	First Time # Pass	First Time % Pass
	# Apps	# Pass	% Pass	% Pass			
Charles A. Jones (CLOSED)	2	0	0.0%	0	0	n/a	
College of Marin	3	0	0.0%	0	0	0.0%	
Cypress	3	2	66.7%	2	2	66.7%	
Downey	10	0	0.0%	0	0	0.0%	
Humphreys University	4	0	0.0%	0	0	0.0%	
South Coast	11	0	0.0%	0	0	0.0%	
Taft	7	0	0.0%	0	0	0.0%	
Tri-Community	4	1	25.0%	1	0	n/a	
West Valley	0	0	n/a	0	0	n/a	
<b>School Total</b>	<b>44</b>	<b>3</b>	<b>6.8%</b>	<b>3</b>	<b>2</b>	<b>14.3%</b>	
Five Plus	13	1	7.7%	1	n/a	n/a	
Out of State	0	0	n/a	0	0	n/a	
RPR	18	14	78%	14	14	87.5%	
Working Reporter	1	0	0.0%	0	0	n/a	
<b>TOTAL</b>	<b>76</b>	<b>18</b>	<b>23.7%</b>	<b>16</b>	<b>30</b>	<b>53.3%</b>	

**Court Reporters Board**  
**Examination Statistics - Jul 1, 2022 Thru Oct 31, 2022**

**English**

School Name	Total # Apps	Overall # Pass	Overall % Pass	First Time Applicants	First Time # Pass	First Time % Pass
Charles A. Jones (CLOSED)	2	2	100.0%	1	1	100.0%
College of Marin	3	0	0.0%	1	0	0.0%
Cypress	3	3	100.0%	3	3	100.0%
Downey	2	1	50.0%	1	1	100.0%
Humphreys	1	1	100.0%	1	1	100.0%
South Coast	9	3	33.3%	6	2	33.3%
Taft	2	0	0.0%	0	0	n/a
Tri-Community	1	1	100.0%	1	1	100.0%
West Valley	0	0	n/a	0	0	n/a
<b>SCHOOL TOTAL</b>	<b>23</b>	<b>11</b>	<b>47.8%</b>	<b>14</b>	<b>9</b>	<b>64.3%</b>
Five Plus	7	4	57.1%	n/a	n/a	n/a
RPR	20	12	60.0%	15	9	60.0%
Work	0	0	n/a	0	0	n/a
<b>TOTAL</b>	<b>50</b>	<b>27</b>	<b>54.0%</b>	<b>29</b>	<b>18</b>	<b>62.1%</b>

**Professional Practice**

School Name	Total # Apps	Overall # Pass	Overall % Pass	First Time Applicants	First Time # Pass	First Time % Pass
Charles A. Jones (CLOSED)	2	2	100.0%	2	2	100.0%
College of Marin	3	1	33.3%	1	0	0.0%
Cypress	3	3	100.0%	3	3	100.0%
Downey	4	1	25.0%	3	1	33.3%
Humphreys	1	1	100.0%	1	1	100.0%
South Coast	0	0	n/a	0	0	n/a
Taft	1	0	0.0%	0	0	n/a
Tri-Community	1	1	100.0%	1	1	100.0%
West Valley	0	0	n/a	0	0	n/a
<b>SCHOOL TOTAL</b>	<b>15</b>	<b>9</b>	<b>60.0%</b>	<b>11</b>	<b>8</b>	<b>72.7%</b>
Five Plus	6	5	83.3%	n/a	n/a	n/a
RPR	19	14	73.7%	14	12	85.7%
Work	0	0	n/a	0	0	n/a
<b>TOTAL</b>	<b>40</b>	<b>28</b>	<b>70.0%</b>	<b>25</b>	<b>20</b>	<b>80.0%</b>

**Court Reporters Board**  
**Dictation Examination Statistics - Nov 2022**

School Name	Total		Overall		First Time		First Time	
	# Apps	# Pass	% Pass	Applicants	# Pass	% Pass	Applicants	% Pass
Charles A. Jones (CLOSED)	4	0	0.0%	0	0	n/a	0	n/a
College of Marin	4	0	0.0%	0	0	0.0%	0	0.0%
Cypress	0	0	n/a	0	0	n/a	0	n/a
Downey	9	1	11.1%	1	1	33.3%	1	33.3%
Humphreys University	5	1	20.0%	1	0	0.0%	0	0.0%
South Coast	11	1	9.1%	1	1	33.3%	1	33.3%
Taft	6	0	0.0%	0	0	n/a	0	n/a
Tri-Community	3	0	0.0%	0	0	n/a	0	n/a
West Valley	0	0	n/a	0	0	n/a	0	n/a
<b>School Total</b>	42	3	7.1%	3	2	25.0%	2	25.0%
Five Plus	13	1	7.7%	1	n/a	n/a	n/a	n/a
Out of State	1	1	100.0%	1	1	100.0%	1	100.0%
RPR	19	12	63.2%	12	10	66.7%	10	66.7%
CVR	6	4	66.7%	4	4	66.7%	4	66.7%
Working Reporter	0	0	n/a	0	0	n/a	0	n/a
<b>TOTAL</b>	81	21	25.9%	21	17	56.7%	17	56.7%

**Court Reporters Board  
Examination Statistics - Nov 1, 2022 Thru Feb 28, 2023**

**English**

School Name	Total # Apps	Overall # Pass	Overall % Pass	First Time Applicants	First Time # Pass	First Time % Pass
Charles A. Jones (CLOSED)	1	0	0.0%	n/a	n/a	n/a
College of Marin	3	0	0.0%	0	0	n/a
Cypress	0	0	n/a	0	0	n/a
Downey	6	2	33.3%	2	2	100.0%
Humphreys	0	0	n/a	0	0	n/a
South Coast	7	4	57.1%	2	2	100.0%
Taft	0	0	n/a	0	0	n/a
Tri-Community	1	0	0.0%	0	0	n/a
West Valley	0	0	n/a	0	0	n/a
<b>SCHOOL TOTAL</b>	<b>18</b>	<b>6</b>	<b>33.3%</b>	<b>4</b>	<b>4</b>	<b>100.0%</b>
Five Plus	6	4	66.7%	n/a	n/a	n/a
CVR	7	4	57.1%	6	3	50.0%
RPR	16	12	75.0%	8	7	87.5%
O/S	1	1	100.0%	1	1	100.0%
Work	0	0	n/a	0	0	n/a
<b>TOTAL</b>	<b>48</b>	<b>27</b>	<b>56.3%</b>	<b>19</b>	<b>15</b>	<b>78.9%</b>

**Professional Practice**

School Name	Total # Apps	Overall # Pass	Overall % Pass	First Time Applicants	First Time # Pass	First Time % Pass
Charles A. Jones (CLOSED)	0	0	n/a	n/a	n/a	n/a
College of Marin	1	0	0.0%	0	0	n/a
Cypress	0	0	n/a	0	0	n/a
Downey	2	2	100.0%	1	1	100.0%
Humphreys	0	0	n/a	0	0	n/a
South Coast	6	3	50.0%	6	3	50.0%
Taft	0	0	n/a	0	0	n/a
Tri-Community	0	0	n/a	0	0	n/a
West Valley	0	0	n/a	0	0	n/a
<b>SCHOOL TOTAL</b>	<b>9</b>	<b>5</b>	<b>55.6%</b>	<b>7</b>	<b>4</b>	<b>57.1%</b>
Five Plus	4	3	75.0%	n/a	n/a	n/a
CVR	6	5	83.3%	5	4	80.0%
RPR	12	10	83.3%	9	8	88.9%
O/S	1	1	100.0%	1	1	100.0%
Work	0	0	n/a	0	0	n/a
<b>TOTAL</b>	<b>32</b>	<b>24</b>	<b>75.0%</b>	<b>22</b>	<b>17</b>	<b>77.3%</b>

**Court Reporters Board**  
**Dictation Examination Statistics - Mar 2023**

School Name	Total		Overall		First Time		First Time	
	# Apps	# Pass	% Pass	Applicants	# Pass	% Pass	Applicants	% Pass
Charles A. Jones (CLOSED)	4	0	0.0%	n/a	n/a	n/a	n/a	
College of Marin	3	0	0.0%	0	0	n/a	n/a	
Cypress	1	0	0.0%	0	0	n/a	n/a	
Downey	12	0	0.0%	2	0	0.0%	0.0%	
Humphreys University	4	2	50.0%	0	0	n/a	n/a	
South Coast	14	3	21.4%	2	1	50.0%	50.0%	
Taft	5	1	20.0%	0	0	n/a	n/a	
Tri-Community	1	0	0.0%	0	0	n/a	n/a	
West Valley	0	0	n/a	0	0	n/a	n/a	
<b>School Total</b>								
	44	6	13.6%	4	1	25.0%	25.0%	
Five Plus	15	1	6.7%	n/a	n/a	n/a	n/a	
Out of State	0	0	n/a	0	0	n/a	n/a	
RPR	20	15	75.0%	13	11	84.6%	84.6%	
CVR	4	2	50.0%	3	2	66.7%	66.7%	
Working Reporter	4	1	25%	4	1	25.0%	25.0%	
<b>TOTAL</b>	<b>87</b>	<b>25</b>	<b>28.7%</b>	<b>24</b>	<b>15</b>	<b>62.5%</b>	<b>62.5%</b>	

**Court Reporters Board  
Examination Statistics - Mar 1, 2023 Thru Jun 30, 2023**

**English**

School Name	Total # Apps	Overall # Pass	Overall % Pass	First Time Applicants	First Time # Pass	First Time % Pass
Charles A. Jones - Steno (CLOSED)	1	0	0.0%	n/a	n/a	n/a
College of Marin - Steno	2	0	0.0%	0	0	n/a
College of Marin - Voice Writer	1	1	100.0%	1	1	100.0%
Cypress - Steno	3	3	100.0%	3	3	100.0%
Downey - Steno	4	2	50.0%	2	1	50.0%
Humphreys - Steno	2	1	50.0%	2	1	50.0%
South Coast - Steno	3	2	66.7%	2	2	100.0%
Taft - Steno	1	1	100.0%	0	0	n/a
Tri-Community - Steno	0	0	n/a	0	0	n/a
West Valley - Steno	0	0	n/a	0	0	n/a
West Valley - Voice Writer	2	1	50.0%	2	1	50.0%
<b>SCHOOL TOTAL</b>	<b>19</b>	<b>11</b>	<b>57.9%</b>	<b>12</b>	<b>9</b>	<b>75.0%</b>
Five Plus	4	2	50.0%	n/a	n/a	n/a
CVR	11	11	100.0%	9	9	100.0%
RPR	25	23	92.0%	23	21	91.3%
O/S	0	0	n/a	0	0	n/a
Work	3	0	0.0%	2	0	0.0%
<b>TOTAL</b>	<b>62</b>	<b>47</b>	<b>75.8%</b>	<b>46</b>	<b>39</b>	<b>84.8%</b>

**Professional Practice**

School Name	Total # Apps	Overall # Pass	Overall % Pass	First Time Applicants	First Time # Pass	First Time % Pass
Charles A. Jones - Steno (CLOSED)	0	0	n/a	n/a	n/a	n/a
College of Marin - Steno	2	0	0.0%	0	0	n/a
College of Marin - Voice Writer	1	1	100.0%	1	1	100.0%
Cypress - Steno	3	2	66.7%	3	2	66.7%
Downey - Steno	4	4	100.0%	2	2	100.0%
Humphreys - Steno	2	2	100.0%	2	2	100.0%
South Coast - Steno	8	4	50.0%	5	4	80.0%
Taft - Steno	1	1	100.0%	0	0	n/a
Tri-Community - Steno	1	0	0.0%	0	0	n/a
West Valley - Steno	0	0	n/a	0	0	n/a
West Valley - Voice Writer	2	2	100.0%	2	2	100.0%
<b>SCHOOL TOTAL</b>	<b>24</b>	<b>16</b>	<b>66.7%</b>	<b>15</b>	<b>13</b>	<b>86.7%</b>
Five Plus	6	2	33.3%	n/a	n/a	n/a
CVR	10	8	80.0%	10	8	80.0%
RPR	26	19	73.1%	23	18	78.3%
O/S	1	0	0.0%	0	0	n/a
Work	3	2	66.7%	2	2	100.0%
<b>TOTAL</b>	<b>70</b>	<b>47</b>	<b>67.1%</b>	<b>50</b>	<b>41</b>	<b>82.0%</b>



# CALIFORNIA DEPARTMENT OF CONSUMER AFFAIRS

## COMPLAINT PRIORITIZATION & REFERRAL GUIDELINES\*

### COMPLAINTS IN CATEGORIES 1 & 2 ARE REFERRED TO DIVISION OF INVESTIGATION

#### CATEGORY 1 • URGENT

- Acts of serious patient/consumer harm, great bodily injury, or death
- Mental or physical impairment of licensee with potential for public harm
- Practicing while under the influence of drugs/alcohol
- Repeated allegations of drug/alcohol abuse
- Narcotic/prescription drug theft; drug diversion; other unlawful possession
- Sexual misconduct with a patient
- Physical/mental abuse of a patient
- Over-prescribing
- Gross negligence/incompetence resulting in serious harm/injury
- Media/politically sensitive cases

#### CATEGORY 2 • HIGH

- Prescribing/dispensing without authority
- Unlicensed practice/unlicensed activity
- Aiding and abetting unlicensed activity
- Criminal violations including but not limited to prescription forgery, selling or using fraudulent documents and/or transcripts, possession of narcotics, major financial fraud, financial elder abuse, insurance fraud, etc.
- Exam subversion where exam is compromised
- Mandatory peer review reporting (B&P 805)
- Law enforcement standby/security (subject to staff availability)

### COMPLAINTS IN CATEGORIES 3 & 4 ARE INVESTIGATED BY BOARD/BUREAU STAFF

#### CATEGORY 3 • ROUTINE

- General unprofessional conduct and/or general negligence/incompetence resulting in no injury or minor harm/injury (non-intentional act, non-life threatening)
- Subsequent arrest notifications (no immediate public threat)
- Exam subversion (individual cheating where exam is not compromised)
- Medical malpractice reporting (B&P 801) cases unless evaluated as category 1 or 2
- Serving subpoenas for hearings and for records (non DOI investigations)
- Patient abandonment
- False/misleading advertising (not related to unlicensed activity or criminal activity)
- Applicant misconduct

#### CATEGORY 4 • ROUTINE

- Unsanitary conditions
- Project abandonment
- Failure to release medical records
- Recordkeeping violations
- Continuing education violations
- Declaration and record collection (e.g., licensee statements, medical records, arrest and conviction records, employment records)
- Complaints of offensive behavior or language (e.g., poor bedside manner, rude, abrupt, etc.)
- Quality-of-service complaints
- Complaints against licensee on probation that do not meet category 1 or 2
- Anonymous complaints unless Board is able to corroborate that it meets category 1 or 2
- Non-jurisdictional issues

\*Complaint prioritization is statutory for some clients and supersedes these Guidelines. See Business and Professions Code sections 2220.05 (Medical Board/Board of Podiatric Medicine) and 4875.1 (Veterinary Medical Board). (Rev 12/2017)

# 5 REASONS

## WHY YOU SHOULD CHOOSE A LICENSED COURT REPORTER

In our state, certified shorthand reporters—commonly referred to as court reporters—are licensed by the Court Reporters Board of California (CRB). To be licensed, a court reporter must demonstrate competency. Using a licensed court reporter is a smart investment to help ensure you receive accurate, timely, and competent transcription service. Here's why:

**1 ACCURACY**—You've only got one chance to accurately capture the legal record. A licensed court reporter provides a word-for-word record and is trained and empowered to ask participants to repeat words, to speak up when necessary, and to clarify technical terms.

**2 QUALIFICATION**—Licensed court reporters must pass a three-part licensing exam and must complete hundreds of hours of training in English, legal and medical terminology, and transcription preparation, plus a minimum of 60 internship hours.

**3 CERTIFICATION**—Not all transcripts are created equal: Only certified transcripts created by a licensed court reporter are guaranteed to be accepted in court.

**4 DOCUMENTATION**—For appeals, the accuracy of transcripts taken during the original proceedings is critical and may impact the ability of your appeals to move forward.

**5 REGULATION**—If a problem or disagreement arises with a licensed court reporter, you can file a complaint with CRB to investigate on your behalf and to ensure the law is followed.

If you need the services of a court reporter, make sure they are licensed by CRB. Find out more about California licensed court reporters, their training and regulation, and their vital services at [www.courtreportersboard.ca.gov](http://www.courtreportersboard.ca.gov); to check a court reporter's license, visit <https://search.dca.ca.gov>.

“First, take great care to prepare a complete record; second if it is not in the record, it did not happen; and third, when in doubt, refer back to rules one and two.”

Justice Rebecca Wiseman, *Protect Our Water v. County of Merced*



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