

2011

Candidate Handbook



Certified eDiscovery Professional



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# Organization of Legal Professionals eDiscovery Certification Exam Candidate Handbook



This handbook has been prepared to explain what is needed to register for the CeDP® Examination. In it, you will find information regarding eligibility factors, the examination process and an application to take the examination.

## Background Information

eDiscovery Professionals come from a wide variety of backgrounds with even more varied job descriptions. Some eDiscovery Professionals are attorneys while other are litigation support professionals, consultants, IT professionals, vendors, paralegals, case managers, expert witnesses, law professors, Ph.D's. Some may have a degree in law, business administration, information management, programming, criminal justice, teaching, paralegal or other areas. Every one of these backgrounds brings special areas of expertise to the eDiscovery field. Much of our training has come after employment as an eDiscovery Professional. Every law firm, institution and discipline have unique requirements.

The examination must be based on those areas that are common to all eDiscovery Professionals. It must, out of necessity, be a basic examination to test core competencies. Questions are formulated to be straight-forward and easily understood.

Items on the examination that you deal with on a daily basis should not require extensive study on your part. It is anticipated that this is part of your working knowledge. Areas that are not part of your daily job requirements may require some research and study. For instance, if you do not deal with substantive issues, you will want to study the requirements of this aspect of eDiscovery. If you are from a country other than the United States, you will want to study the United States New Rules of Federal Discovery.

OLP, a non-profit and vendor-neutral association, established the Certification Program for eDiscovery Professionals in order to create an internationally accepted level of knowledge, education and experience by which eDiscovery Professionals will be recognized by the legal community. The Certification Exam has been developed and designed with OLP's strategic partner, Pearson Vu, a division of Pearson Learning Solutions, the global leader in development of certification exams. Content has been provided by OLP while Pearson has provided a team of Ph.D.s and a measurement services team including psychometricians with advanced degrees in the science of measurement. They analyze test data, equate test forms, identify problem items, and conduct item pool reviews and gap analyses. These measurement

professionals review performance statistics for every item and make recommendations for examination improvement, ensuring that the range of item difficulty is appropriate and that problem items are identified for review.

Those individuals so approved may use the title "Certified eDiscovery Professional" or CeDP®.

Depending upon background, education, license and experience, a Certified eDiscovery Professional may serve as an attorney, paralegal, eDiscovery Manager, Litigation Support Manager, Practice Support Director, Litigation Support Analyst, consultant, vendor, law professor, case manager or other eDiscovery Professional involved in one or more aspects of eDiscovery including data collection, analysis, or monitoring; case management; protocols, best practices and standards; international eDiscovery; recruitment and enrollment of candidates, identification, process and analysis, trial presentation, information management, electronically stored information, preparation of reports; construction or monitoring of case report forms; records management, budget development; report preparation; education of other legal professionals, trial, drafting of pleadings and documents, protocol development; program administration; and research.

The certification examination has been developed by OLP's Certification Committee and Pearson Learning Solutions and designated members who have demonstrated expertise in the development, management, and administration of eDiscovery. Test questions have been written by OLP member from diverse backgrounds and job descriptions. The examination is intended to evaluate the applicant's knowledge and skill in comparison to the demands on an eDiscovery Legal Professional as they are found in practice of law as attorneys and non-attorneys. OLP has developed a standard core series of competencies that reflects the basic knowledge required of eDiscovery professionals. These Core Competencies are assessed by the Certification Examination.

## **Standards of Practice**

It is the goal of the Organization of Legal Professionals to encourage members, and assure the competency of certified members, in their application of approved eDiscovery regulations and approved eDiscovery guidelines. Members are expected to adhere to national, state, local and provincial regulations and to international guideline and all applicable Federal, state and local laws and policies.

## **Examination Development**

The certification examination has been developed by OLP's Certification Committee and designated members who have demonstrated expertise in the development, management, and administration of eDiscovery. OLP's partner in development of the exam is Pearson Vu. Test questions have been written by Legal Professionals from diverse backgrounds and job descriptions. The examination is intended to evaluate the applicant's level of knowledge and skill in comparison to the demands on an eDiscovery Professional as they are found in the practice of law and non-attorney duties.

Unlike many certifying organizations in the legal field, OLP's membership is made up of individuals with a wide variety of backgrounds and job descriptions. Much of the training required of a Legal Professional is specific to the law firm, practice specialty and discipline in which they are employed. It would be impossible to develop one examination that would measure a level of expertise for each specific area in the legal field. Satisfactory completion of the OLP Certification Examination indicates that the applicant has surpassed the minimum level of education and experience required of an eDiscovery Professional.

The world of eDiscovery is a constantly changing work environment for the eDiscovery Professional. For that reason, the Certification Program and the certification examinations will be a continually evolving project, which will be directed by the needs of the membership. It is anticipated that the certification

program will develop levels of certification in the near future that will additionally define the term "Certified eDiscovery Professional."

## **Applying for the CeDP® Exam**

There three easy steps to begin the CeDP® examination process:

1. Complete the application form
2. E-mail, fax or mail your application with supporting documents and payment. You may pay the application fee online via credit card or PayPal.
3. You may choose to take the certification exam with or without enrolling in the online, self-study prep courses. Once your application and payment has been received and approved, we will send you an identification number that allows you to download the prep courses (if you have signed up) and also allows you to register for the CeDP® exam at any one of over 1,000 Pearson centers worldwide.

## **Qualifications and Eligibility Requirements**

To be eligible to sit for the CeDP® Examination, all candidates must:

1. Provide three professional references.
2. Provide a resume or bio including employers' contact information.
3. Submit a completed application with supporting documentation and the examination fee.

## **I. Education**

### **Requirement**

CeDP candidates must hold a bachelor's degree (or higher degree) or its educational equivalent from an accredited college-level institution. Candidates must meet the education requirement before their CeDP application can be approved and before they can register and sit for the exam.

### **Equivalents/Exceptions**

- Certain international professional designations (such as Chartered Accountant) may be accepted as equivalent to a bachelor's degree. Professional work experience will not substitute for an appropriate degree.
- Applicants who do not have a bachelor's (or higher) degree but believe that their educational achievements or professional designations qualify as equivalents to a bachelor's (or higher) degree must choose "Other" in the "Education" section of the CeDP application and provide specific information in the space provided, as well as submit required documentation. Information submitted should be sufficiently detailed to enable the Professional Certification Board to determine equivalency. Documentation of educational achievements should clearly indicate that the education is equivalent to a bachelor's degree.

### **Required Documentation**

- Applicants must indicate their highest level of education on the CeDP application.
- Proof of education (copy of degree or transcripts) is required. This document should be faxed or e-mailed (along with a cover sheet indicating the candidate's ID number) immediately following completion of the CeDP application.
- Candidates may be accepted into the CeDP program based on the information they provide about their education on the application, but supporting documentation is still required. Once a candidate's

application is approved, the candidate may begin the exam registration process before submitting the remaining documentation.

■ Applicants must provide accurate information on the CeDP application. If a candidate's submitted documentation does not support the information that was provided on the application, the candidate can face review and censure including, but not limited to, removal from the CeDP program and revocation of CeDP exam parts or certification.

## **II. Experience**

### Requirement

■ CIA candidates must obtain a minimum of 5 years experience in eDiscovery or its equivalent.

### Candidates

may apply to sit for the CIA exam prior to satisfying the professional experience requirement but they will not be certified until all program requirements have been met.

### Equivalents/Exceptions

■ Acceptable equivalent experience includes experience in computer forensics, litigation support, records management, risk management, the practice of law or compliance or paralegal experience.

■ A J.D. or Ph.D. degree can be substituted for two years of the required 5 years eDiscovery experience. An MBA or MA degree can be substituted for one year of the required 5 years eDiscovery experience.

### Required Documentation

■ A completed, signed Experience Verification Form (available in this handbook) is required. This document should be submitted upon full completion of the experience requirement.

## **Cost of the exam**

### ■ Cost for OLP Members:

Certification Exam: 395.00 USD

Certification Exam and online prep course: 695.00 USD

OLP Members who are government employees: 495.00 USD

### ■ Non-Members:

Certification Exam: 595.00 USD

Certification Exam and online prep course: 895.00 USD

Please contact OLP for group discounts.

Candidates **can save money** on the cost of the exam by applying for OLP membership. The cost for OLP individual membership is \$95/year. Membership in a local OLP chapter is an additional \$30.

The exam must be taken in Pearson VUE secured environment facilities.

## **Examination Content**

The certification examination is made up of five major subject areas. Each major area will be included in each examination, but specific questions will vary from one examination date to another. The percentage of questions from each area will change slightly from one examination to another with each question equivalent in weight. There are 100 questions given in a two-hour time period in a secured facility with a proctor. This examination will be revised at least every two years following a review by the Certification Committee.

## **Period of Eligibility**

Once approved, you will have one year within which to take the exam. After one year, you will be required to complete a new application and fulfill all the submission requirements again.

For each testing period that you intend to take the exam, you will need to use the same online application form to register your intent to test and pay the exam fee before the application deadline for that testing period. If you register to take the exam and later decide not to test, you will need to contact OLP to either transfer to another testing period (if eligible) or cancel your exam registration for the current testing period. Transfer or cancellation fees may apply depending on how far in advance you submit your request.

## **Rescheduling or Canceling an Examination Date**

Refunds are not provided to candidates withdrawing from an exam after registration. Candidates with a need to change or cancel examination dates or times must do so no less than 72 hours before the scheduled examination date. OLP charges an administrative fee of \$100 for members, \$75 for members employed by a government agency and \$250 for non-members for those changing or canceling prior to 72 hours. Please contact us regarding retaking the examination at [certification@theolp.org](mailto:certification@theolp.org) or 760-610-5462.

## **Scheduling Information**

Appointments may be made in advance or on the day you wish to test, subject to availability. Pearson VUE offers a variety of scheduling options. Once your application has been approved, you will be offered a choice of facilities in which to take the exam.

If an emergency, such as weather or unforeseen circumstances, forces cancellation by OLP or Pearson VUE of an examination at a testing center, all scheduled candidates will be contacted and receive notification concerning the rescheduling and instructions for reapplying. We will do everything possible to minimize the inconvenience.

## **About Pearson VUE**

Pearson VUE delivers over 4 million high-stakes exams a year for clients in the licensure, certification, academic admissions, regulatory and government testing service markets. It boasts the world's leading test center network with over 5,000 testing centers available, 165 countries and over 1,000 testing centers worldwide available for the CeDP® exam. These centers utilize a patent-winning design which was created specifically for high-stakes testing and offers a carefully controlled, consistent testing environment.

## **What to Bring the Day of the Exam**

Typically, you are asked to bring two forms of identification including one government-issued photo identification. Some testing programs may have additional requirements. You will receive a confirmation email with program-specific information. Wear comfortable clothing and shoes.

## **When to Arrive**

Typically, you are asked to arrive at the test center 15-30 minutes prior to your scheduled appointment time. This extra time will give you an opportunity to check-in and to relax prior to beginning your test.

The amount of time you are asked to arrive at the test center before your scheduled appointment time differs for each program. You will receive a confirmation email with program-specific information.

### **Examination Room Restrictions**

To maintain strict security, there are items that are not permitted in the examination room. These include a electronic devices including iPhones, iPads, Kindles (or similar devices), laptops, notebooks, Blackberry's, cellular telephones of any kind, digital watches, PDAs, calculators, purses, bags of any kind, coats and any written materials. You will receive an email once your application is accepted with more detailed instructions. Lockers are available on examination room premises for your convenience.

### **Results of Exam**

Pearson VUE is required to submit test results to your testing program within 24-72 hours of its completion.

### **Retaking the Exam**

If you do not pass the exam, you may only take the CeDP® exam every 90 consecutive days, not including the day of your test for a period of one year.

### **Security**

Pearson VUE is committed to provide the most secure environment for the testing business of clients and takes great pride in overlapping layers of defense found in Pearson processes, protecting the integrity of your testing program, people, systems and data. Pearson employs a variety of security methodologies within test delivery outlets such as integrity shopping and advanced data forensics, to aid in the prevention of intellectual property theft, cheating and proxy test taking. The testing centers provide a proctor to oversee the testing. You will be asked to sign a non-disclosure agreement at the Pearson VUE Testing Center. The influence of Pearson's dedication to security can be seen throughout all levels of the organization from beginning to end.

### **Term of Certification**

The CeDP® is awarded for two years to continuing members of OLP. Renewal after three years requires 8 hours of validated continuing education credit per year, completion of a re-certification exam, a re-certification fee and consecutive years' membership in OLP. Falsification or misrepresentation of application information will invalidate the applicant's certification.

### **Continuing Requirements**

All CeDP® designees must be a member of OLP. You can renew the certification every two years by taking a re-certification exam.

All CeDP® must take 8 CLE units per year to maintain the certificate. CLE must include 2 units of ethics; 2 units of technology and 2 units of substantive law in eDiscovery.

Please submit proof of attendance to OLP.

### **Promoting Your Credential**

Maximize the recognition of your CeDP® credential by taking the following steps:

- Be sure to include the CeDP® designation on your business card, correspondence, resume and in professional social media such as LinkedIn.
- Inform your supervisor and Human Resources Department that you have earned the CeDP®. To have confirmation of your CeDP® sent to your employer, contact [certification@theolp.org](mailto:certification@theolp.org).
- If your organization's Human Resources Department is not familiar with the CeDP® program, direct them to the OLP website. ([www.theolp.org](http://www.theolp.org)) To request OLP brochures, please contact OLP member services at [info@theolp.org](mailto:info@theolp.org) or call 760-610-5462.
- Become an active member of the OLP community by participating in the OLP network online. Stay current with the OLP UPDATE quarterly electronic newsletter, monthly newsletters, webinars, online courses and publications, Meet N Greets, seminars and conferences.
- Participate in mentoring programs organized by your local OLP chapter or council, and take the opportunity to encourage other qualified professionals to consider applying for the CeDP®.
- To obtain a sample press release contact [info@theolp.org](mailto:info@theolp.org).

### **Educate and Inform**

Here are some facts you may want to share with colleagues to increase awareness of OLP, the CeDP® credential and its value as the gold standard credential for legal professionals. The CeDP® is an advanced professional certification specifically designed to measure the critical skills that are especially relevant for success in eDiscovery.

- The CeDP® program promotes mastery of eDiscovery, analysis, control, and decision support through a rigorous curriculum and an extensive exam process.
- The CeDP® is an advanced professional certification specifically designed to measure the critical substantive, technology and management skills that are especially relevant for success in a law environment.
- Compliance with all laws, rules, ethics, policies and best practices is a requirement for maintaining the CeDP® credential.
- CeDP® designees hold key management positions—all the way up to Managing Partner, Administrators and C-Suite—in a wide range of organizations including multinational law firms, corporations, government agencies, academic institutions, and not-for-profit organizations.

### **Candidates with Special Needs**

Applicants having special needs should contact the OLP office to discuss testing requirements for persons with physical, sensory or learning disabilities. A Special Needs Request Form is provided within this Candidate Handbook.

### **Anti-Discrimination Policy**

OLP places no importance and does not discriminate based upon age, gender, race, color, religion, national origin, sexual orientation, disability or marital status.

## **Compliance with Americans with Disabilities Act**

OLP does not discriminate against qualified individuals due to a disability in its programs, services, or activities. We are committed to providing access and reasonable accommodations to take the certification exam for those with disabilities in compliance with the American with Disabilities Act of 1990 (ADA) and corresponding state and federal law.

Under the ADA, anyone who has a physical or mental impairment substantially limiting one or more major life activities, has a record of such impairment, or is regarded as having such impairment, is considered a person with a disability. In accordance with the provisions of the ADA and Section 504 of the Rehabilitation Act of 1973, disabilities may include, but are not necessarily limited to, visual impairment, mobility and orthopedic impairments, hearing impairments, chronic medical conditions, learning disabilities, and psychological disorders.

## **How to Apply**

Send the completed application provided in this handbook and mail or e-mail it together with your examination fee and supporting documents to:

Organization of Legal Professionals (OLP)  
44-489 Town Center Way Ste. D436  
Palm Desert, CA 92262  
760-610-5462  
or email to: [certification@theolp.org](mailto:certification@theolp.org)

Download our brochure:

**Questions?** For resources and support regarding your CeDP® credential, please contact OLP member services at [certification@theolp.org](mailto:certification@theolp.org) or call 760.610.5462.

## Prep Course Outline

The following is a partial outline of the prep courses

### The Discovery Process

- Rules and Regulations
- Understanding all phases of the EDRM
- Litigation Holds
- Landmark Cases
- Depositions
- Early Case Assessment
- Meet and Confer Conference

### Key Technical Knowledge

- Types of ESI
- Data Retention
- ESI & Paper Processes

### Vendor Relations

- RFPs and RFIs

### Legal Responsibilities

- Sanctions

### Technical Trends in eDiscovery

### Applications

- Software for each phase of the EDRM
- Search & analytical technologies
- Software delivery protocols

### Trial Presentation

### Project Management

## Acknowledgement

I certify that I have read and understand all portions of the CeDP® Handbook.

I hereby declare that the information contained within the application and supporting documentation is complete and truthful. I further pledge not to divulge the contents of any examination questions for the Certified eDiscovery Professional certification.

I understand that my CeDP designation may be suspended or revoked and that I may be prohibited from taking any further exams for the following reasons:

1. Falsification of information on application form or in supporting documentation.
2. Subsequent conviction of the unauthorized practice of law.
3. Failure to meet continuing legal education requirements as required to maintain the CeDP®.
4. Divulging the contents of any examination questions.
5. Subsequent conviction of a felony.

I certify that I have never been convicted of a felony nor had a professional license or certification denied, suspended or revoked (other than for lack of minimum qualifications or failure of examination). I further certify that I have never been censured or disciplined by any professional organization.

I understand that any false statement, misrepresentation or concealment or material omission of the information I have provided or failed to provide on my application and supporting documentation may result in rejection of my application or suspension or revocation of my CeDP® designation.

Signature

Date: \_\_\_\_\_

\_\_\_\_\_  
Print Name

Please mail hard copies or e-mail your application and supporting documentation to:

Organization of Legal Professionals (OLP)  
44-489 Town Center Way Ste. D436  
Palm Desert, CA 92262  
760-610-5462

[certification@theolp.org](mailto:certification@theolp.org)

## Eligibility Form

Name:

Highest Level of Education:

Degree(s):

Institution:

Date of Graduation:

International Professional Designations:

Educational Achievements in lieu of degree:

Years of work experience:

Years of work experience in the legal field:

Years of eDiscovery experience:

Work History:  
(You may attach a resume.)

Three Professional References: Name, contact information and e-mail.

(1)

(2)

(3)

Other Education:

Professional Associations:

Work History in lieu of degree:

Certifications:

Professional Certificates:

CLE:

## CeDP® EXAM SPECIAL ACCOMMODATIONS REQUEST

Name:

(First) (Middle) (Last)

Address:

(Street) (City) (State) (Zip Code)

Phone #:

Test Center Where You Plan to Test:

Approximate Test Date Preferred:

Specific accommodation you are requesting:

- Reader
- Extra time
- Special seating
- Separate testing area
- Other (Please describe)

---

SIGNATURE: \_\_\_\_\_ Date: \_\_\_\_\_

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Print Name

Please return to:

OLP

[certification@theolp.org](mailto:certification@theolp.org)

44-489 Town Center Way Ste. D436

Palm Desert, CA 92262

760-610-5462



Certified eDiscovery Professional

## Application Certified eDiscovery Professional (CeDP®) Examination

- |  |     |    |
|--|-----|----|
| 1. I am registering for both the CeDP Prep Course and the certification exam:  | Yes | No |
| 2. I am registering for the certification examination without the prep course: | Yes | No |
| 2. My firm has prepaid for a testing voucher:                                  | Yes | No |

3. Name of Firm:

4. **Your Name:**

5. Preferred mailing address and contact information for all CeDP related items

\*Please provide a physical address

Address:

City: State/Province:

Country: Zip/Postal Code:

Daytime phone number:

Cell phone:

Fax Number:

6. Email:

**7. Organization Information:**

Current Firm/corporation/government agency:

Address:

City: State/Province:

Country: Zip/Postal Code:

Daytime phone number:

Fax Number:

8. Position/Title:

9. During and after completion of the certification process, how would you like your information handled?

Would you like public recognition of your achievement? Option b will be assigned if no boxes are checked.

a) \_\_\_\_ Yes, my contact information and CeDP status are releasable to persons who request information.

b) \_\_\_\_ No, I do not want OLP to publicize my CeDP status but I acknowledge and agree that OLP may release such information if a valid subpoena has been served.

10. Education, Experience and/or Training Qualifications:

Education: \_\_\_\_\_  
Number of years of eDiscovery experience \_\_\_\_\_  
Number of years in the legal field \_\_\_\_\_

Please list experience related to ediscovery. This may include but is not limited to work related experience, teaching, consulting, sales, writing, speaking, technical writing, technology, computer forensics, management, sworn testimony, expert witness and other related areas. Also include names of employers if any. You may include additional pages. Or, please provide a resume or bio that covers these questions.

Please provide copies of transcripts, certifications or certificates of completion, professional associations or other documentation.

Training Qualifications: Please provide documentation confirming eDiscovery or related training or that you acted as an instructor in a CLE event.

**Statement of Qualifications:**

I certify that I meet the experience and training requirements to apply to become a Certified eDiscovery Professional. The information contained in this application and attachments are true and correct to the best of my knowledge.

Signature:

Date:

\_\_\_\_\_

\_\_\_\_\_

• Digital certificate signed applications may submitted via email with attachments to:  
[certification@theolp.com](mailto:certification@theolp.com)

• Hand signed applications need to be mailed with attachments to:

Organization of Legal Professionals  
44-489 Town Center Way Ste. D436  
Palm Desert, CA 92262  
760-610-5463

After the information contained on this application is verified, you will be emailed instructions on how to register with Pearson VUE ([www.pearsonvue.com](http://www.pearsonvue.com)) and take the examination. More information is available at <http://www.theolp.org>.

## Fees

Examination	Member	Voucher	Prep Courses Yes or No	Fees	Total
<b>Members</b>					
Certification Exam	x		Without Prep Course	395.00	
Certification Exam and online prep course	x		With Prep Course	695.00	
Government employees	x		Without Prep Course	295.00	
Government employees	x		With Prep Course	595.00	
<b>Non-Members</b>					
Certification Exam			Without Prep Course	595.00	
Certification Exam and online prep course			With Prep Course	895.00	
<b>Membership</b>					
Individual Membership				95.00	

### 4 Easy Ways to Pay:

1. Online via credit card or call us to pay via credit card
2. PayPal
3. Via Check
4. Invoice: Please send request to [certification@theolp.org](mailto:certification@theolp.org) or call 760-610-5462.  
Please go to [www.theolp.org](http://www.theolp.org) to register and to pay tuition.

Contact us regarding group discounts.

Candidates can save money on the cost of the exam by applying for OLP membership. The cost for OLP individual membership is \$95/year. Membership in a local OLP chapter is an additional \$30.

