

**REPORT FROM THE LICENSED PARALEGAL ASSESSMENT COMMITTEE
OF
THE OREGON STATE BAR
May 25, 2023**

Background

The Oregon Supreme Court approved rules in July 2022 to establish requirements for the limited licensure of qualified paralegals and their regulation as Associate Members of the Oregon State Bar.¹ The rules will allow Licensed Paralegals² to practice family law and residential landlord-tenant law starting July 1, 2023, within specific case-type and advocacy limits. The initiative is intended to improve access to justice, while ensuring consumer protection, in two areas of law in which the vast majority of litigants are unrepresented.³

The Oregon State Bar (OSB) charged its Board of Bar Examiners (BBX) with developing the initiative. The BBX, in turn, appointed the Licensed Paralegal Assessment Committee (LPAC) in late 2022 to discuss and recommend certain components for assessing applications from those seeking this limited licensure. After public comment, the BBX will consider these recommendations in preparing its OSB rules to process applications.⁴

The LPAC met twelve times between December 2022 and May 2023 in ninety-minute meetings. The group was chaired by attorney Jody Stahancyk and staffed by Troy Wood, Regulatory Counsel for the OSB, and Kellie Baumann, Project Manager in the OSB Regulatory Division. The Committee's members were judges and attorneys in the family law and landlord-tenant fields, paralegal educators, and a

¹ See [Oregon Supreme Court Rules for Licensing Paralegals \(RLP\)](#) and [Oregon Supreme Court Rules for Professional Conduct of Licensed Paralegals \(PCLP\)](#), both approved July 19, 2022. See also the implementing legislation in [SB 306, signed by the Governor on May 8, 2023](#).

² The official terminology for the name of the license has not yet been announced by the Oregon State Bar. The Committee therefore uses the term "licensed paralegal" throughout the report as a placeholder term.

³ The April 2022 [Report from the Oregon State Bar's Paralegal Licensing Implementation Committee \(PLIC\)](#), which recommended the initiative to the Oregon Supreme Court, provides detail on the access to justice theme, the study done on similar efforts in other jurisdictions, and the outreach efforts undertaken to develop the proposal for Oregon.

⁴ A committee authorized by Supreme Court rule, the Committee on Paralegal Assessors (CPA), has not yet been appointed but will conduct the actual review of individual applications according to standards set out in Supreme Court rule and implemented in as-yet undrafted OSB regulation.

national consultant on diversity and equity issues.⁵ Advisory members included the Vice-Chair of OSB's Board of Bar Examiners, two additional attorneys who work in Oregon as paralegal educators, and a practicing paralegal.

Committee Charge, Structure, and Values

The LPAC's charge was to make recommendations in three of several areas the Supreme Court rules have detailed as requirements for admission:

1. Practical Experience – Develop the regulatory tools that will assist OSB staff in enforcing the PLIC's minimum 1500 hours of substantive experience⁶
2. Examination – Establish the structure, format, components, process for drafting questions, and testing policies for the required examination
3. Portfolio – Set criteria for artifacts or documents that may be included in a portfolio; recommend the composition of subject matters for a portfolio; and identify the types of documents that will demonstrate an applicant's learning and abilities in the relevant subject matter

Because the Supreme Court rules go into effect on July 1, 2023, and Committee members desired public comment before submission to the Board of Bar Examiners, the LPAC worked to meet a May 31, 2023, deadline. Bi-monthly meetings increased to a weekly frequency for this reason. Authorized practice under these rules will be effective as of January 1, 2024 pursuant to SB 306. Pursuant to the Supreme Court rules, the Oregon State Bar is expected to begin accepting applications in July 2023.

The LPAC structured itself into two workgroups, one working primarily on the examination issues and the other on the portfolio requirements. The two workgroups met both separately and jointly, sharing in joint session reports on each group's work and discussions on the substantive experience component.

Identified values guided the work of the Committee as a whole. Members determined that each assessment tool or approach should:

- Reliably measure competence through a repeatable process
- Achieve equitable outcomes and support a more diverse legal profession
- Have processes that are fair to all participants
- Be scalable to more than a pilot-size group
- Be consistent in producing measurable material comparable to other assessment concepts in bar licensing practices
- Be enforceable by standards, regulations, and rules
- Not exceed available resources of the Oregon State Bar
- Have sufficient support from employers, legal consumers, OSB attorney members, and other relevant stakeholders
- Produce "day-one," practice-ready paralegals and

⁵ In addition to Chair Stahancyk, the LPAC members are Grace Lee, Joan Marie Michelsen, Page Beetem, Warren Hodges, the Hon. Mark Peterson, and Senior Judge Maureen McKnight. Liaisons to the Committee included Dr. Anthony Rosilez, Aubrey Baldwin, Crystal Sullivan, Linda Odermott.

⁶ The requirement for Law School graduates is a reduced 750 hours.

- Produce measurable data points that can be compared over time to determine the effectiveness of the program or identify areas that need adjustment

Planning Meetings

In planning meetings before the Committee was appointed, stakeholders convened by OSB determined that the Rules for Licensing Paralegals (RLP) included many necessary rules and descriptions for administering the program but no consumer-friendly document explained the program and its processes in a plain language format. The planners concluded that a flow chart was needed to describe the licensure process to applicants and other stakeholders to the paralegal program. This document was also intended to help the soon-to-be-formed Committee understand the timing for assessing certain requirements and to identify the steps and sequence for the assessments.

The planning group then worked with Regulatory Counsel of the OSB to develop a flow chart mapping the RLP's licensure requirements and assessment steps. This product assisted Regulatory Counsel in understanding the time and resource commitments needed for this program to be successful. The chart also translated the rule wording into a plain language format that could easily be understood by applicants, their supervisors, and educators. The LPAC members later endorsed the public availability of this flow chart, a copy of which is attached to this report as Exhibit 1.

Recommendations on Practical Experience

The Committee recognized that applicants will gain their practical training experience in several ways: practicums and internships for those in paralegal programs and law schools, actual employment in law firms, and service in military justice programs (Judge Advocate General, or JAG Corps). For this reason, different applicants will track the required hours of experience in different ways, as addressed in the rules. The Committee therefore focused on tools that would both encourage attorneys to train potential applicants by offering supervision and also assist supervising attorneys to document the completion and nature of those required hours.

The PLIC had developed a bullet-point document for public information that identified the types of cases for which paraprofessionals could be hired, the requirements for licensure, and the limits of their license.⁷ LPAC members felt that this product would be enhanced by a one-page document identifying the benefits lawyers and legal consumers who hire licensed paraprofessionals would realize. The Committee endorsed leaving the contents of this benefits page to bar staff administering the program, as such staff will gain additional information about those benefits as the program develops. The Committee drafted and revised a recommended certification form that supervising attorneys would use to document completion of applicants' required "substantive legal experience" hours.⁸ Members

⁷ [That PLIC-developed summary is located here.](#)

⁸ PLR 1.1(): ". . . substantive legal work performed under the employment or training of an Attorney Member or an approved paralegal education program" identified elsewhere in the PLRs. "Substantive paralegal experience

recommend that the form be available on the OSB website. A sample version is attached as Exhibit 2, again with the Committee's recommendation that bar staff administering the program make needed adjustments.

The Committee also discussed the benefit of potential applicants and supervising attorneys having access to a comprehensive but non-exclusive list of the type of work that would qualify as "substantive legal experience" under the Supreme Court's rules general definition. Members examined the expansive list of substantive tasks the PLIC had described. That document is attached as Exhibit 4. The Committee endorsed a modified list for inclusion in the packet provided to applicants. This document is attached as Exhibit 3. Members believed that the availability of the list will provide the guidance supervising attorneys will want in documenting applicants' qualified hours. Similarly, its availability will ensure that applicants appropriately plan and claim only qualifying hours. Early access to the document as the program starts is especially critical since clear guidance will help instill overall confidence in the program from the outset.

The Committee's discussion on practical, substantive experience included review of the 20 hours of coursework Supreme Court rules require for applicants in the 18 months before licensure. Members reached consensus on a suggested composition for that course work, to flesh out the rule's requirements, but include no formal recommendation here since that issue was beyond the Committee's charge.

Recommendations on the Portfolio

The Committee reviewed both the PLRs on portfolios and the PLIC's recommendations regarding this method of measuring applicants' core competencies. Members agreed with the PLIC that portfolios offer both a broader equity focus than an exam but probably also present a more complex task for which to develop regulations and to grade. The Committee structured its own discussion by first identifying the categories of competencies it felt were core to a legal practitioner in general and to family law and eviction specialists distinctively. The Committee then discussed the composition of the portfolio. This conversation addressed the need to allow the widest scope possible in the content of submissions meeting competency categories, given the variety of paths applicant will take to licensure, against the concomitant task of the individual assessors to review and grade these portfolios. Several recommendations were formed:

- Applicants must submit 12 separate work-related items.
- Each item should have a minimum and maximum word count set and adjusted by the Committee on Paralegal Assessors (*see footnote 3*)
- Applicants must identify the category of competency for which they are submitting a particular item
- Applicants may submit an individual item in only one category

requires knowledge of legal concepts and processes that are customarily, but not exclusively, performed by a lawyer, but does not include administrative functions."

- A cover form should be developed for applicants that highlights the need to preserve client confidentiality in submissions and prompts the applicant to identify for each work-product item the competency category under which the item is submitted and a character-limited field to describe the item and provide the context in which it was drafted
- A grading rubric,⁹ proven reliable through interrater¹⁰ reliability measurements, should be developed for assessing the items in applicants’ portfolios
- For the composition of the portfolio items, the following elements should initially guide the Committee on Paralegal Assessors (CPA), though the LPAC recognizes that the CPA’s actual work volume or other changing circumstances will warrant adjustments:

Category of Core Competency	Items Needed
Document Production, Negotiation, & Litigation	4
Client Communication	2
Professional Responsibility	2
Legal Writing	1
Research	1
Technology	1
Office Management & Business Practices	1

Committee members also discussed the difficulty applicants may have in producing work-product items “exclusively completed by the applicant” as required in PLR 1.1(v) and 3.3 given the wide use of both court-developed model forms in family and eviction law and the common practice in firms of sharing briefing and form banks. Members endorsed a revision to these rules to reflect a “substantially completed” or similar standard that may be contingent on the type of work-product involved.

Finally, the members discussed the issue of whether and, if so what, limits should be imposed on an applicant’s attempts to remedy portfolio submissions the CPA assessors find insufficient under PLR 6.1(c). The group recommended a one-month period for an applicant to resolve these types of issue.

⁹ A rubric is an assessment tool setting out explicit criteria, performance levels, and other descriptors that reduce grading subjectivity.

¹⁰ Interrater reliability is the degree to which different graders rate the same item or performance consistently.

Recommendations on Exam

In addition to a portfolio and other admission conditions, the Supreme Court rules require that applicants pass an examination. Considerable Committee discussion occurred on the focus of the exam: whether it should concentrate on the scope-of-license and attorney referral obligations (topics the PLRs require for examination) or also include subject-matter expertise on legal issues (topics not required but allowed by the PLRs and necessary for the attorney bar exam). Some members were hesitant about not testing on substantive matters but the workgroup examined – and ultimately agreed with -- the PLIC’s reasoning and PLR approach that the work hours and portfolio would predominantly demonstrate substantive competencies while the exam offered the optimal way to assess the unique limitations of the paralegal’s license. Said differently, members believed the licensing requirements for paralegals assess competencies in the practical, field context much more holistically than for attorneys due to the experience hours and portfolio elements; the appropriate focus of the examination should therefore be the limitations on the scope of paralegal practice and the situational obligation of the paralegal to refer the client to an attorney. Significantly, members recognized that exam questions focused on the ethical and regulatory issues would often by necessity incorporate and reflect applicants’ *substantive* legal knowledge as well.

In regard to specific exam questions, members discussed the need for questions that involved fact-intensive scenarios about which a series of questions could be asked, rather than successive unrelated questions. Members also developed a few sample hypotheticals to discuss but concluded that outreach to a group of bar members specializing in either family law or eviction law would be most productive for developing sample fact patterns prior to review by psychometricians.¹¹ Members also recommended that the Oregon State Bar consult with national organizations certifying paralegals about the latter’s testing materials to aid in question development. Once exam questions were formulated, the Committee envisioned that a group of subject-matter experts will review the product to determine which questions implicate answers required for passage.

The Exam Workgroup recommended to the full Committee:

- in-person, proctored testing
- cooperation with community colleges across Oregon who have offered their campuses as testing sites
- geographic rotation of the site each quarter to accommodate applicants’ transportation issues as equitably as possible
- that the test would be no more than 3 hours and broken into at least two segments if the test is two hours or more. Whether the test will be strictly multiple choice, or also include short answers and form completion should be left up to the OSB staff administering the program after consulting with a psychometrician on this issue. The Committee preferred a form completion exam session over a multiple-choice model but members recognized that substantial resources would go into the development of the former. (A form completion test is one where applicants

¹¹ A psychometrician is a scientist who develops, studies, and validates skill and aptitude testing.

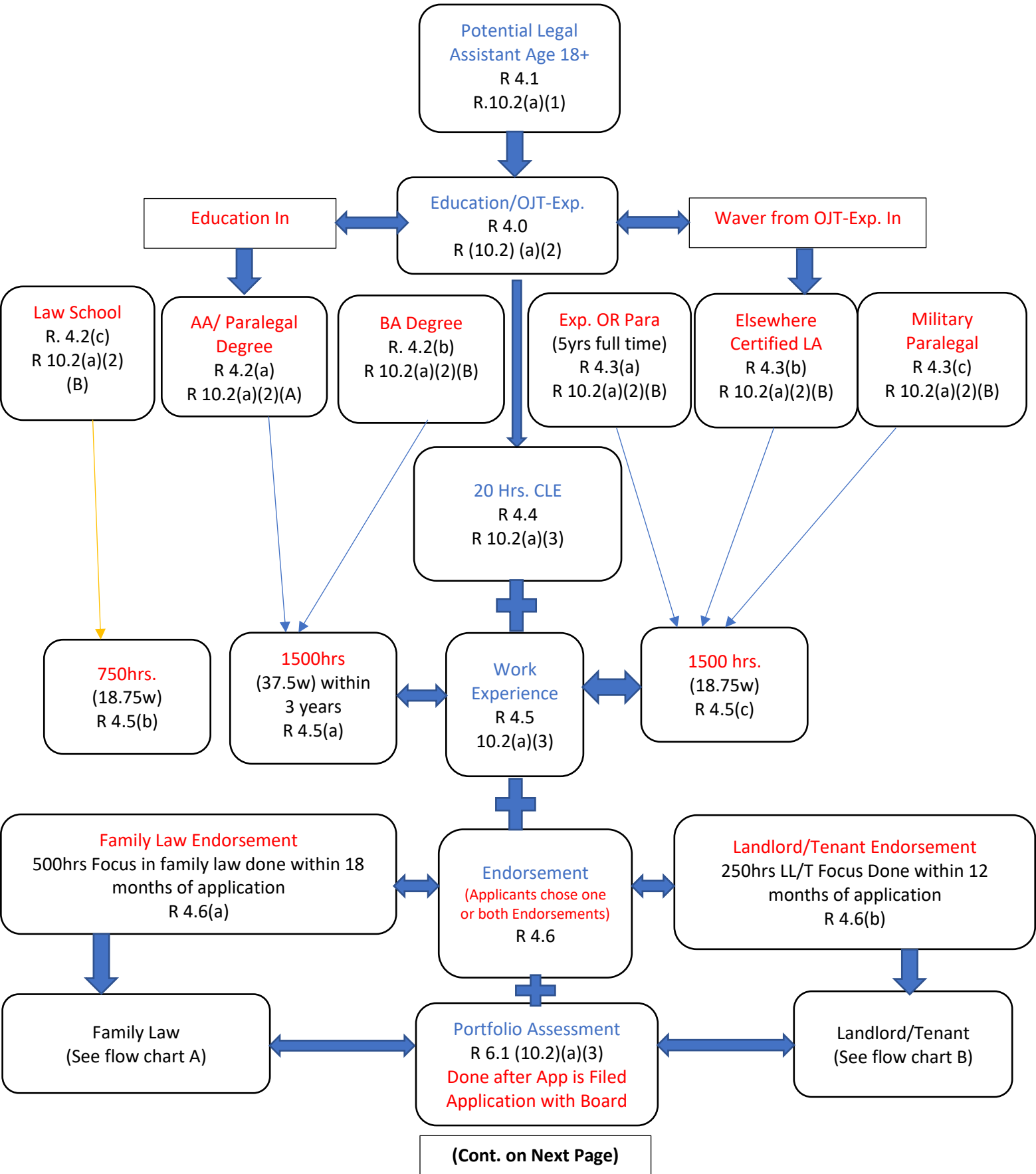
are required to complete a court form by selecting the correct terms, words, or phrases from a drop-down menu of options that could be placed in certain fields within the form).

Next Steps

Public comment on the recommendations of the LPAC is the next step, as the Supreme Court rules are set to be effective July 1, 2023, and the OSB expects immediate applications from a pool of individuals aware of and potentially qualifying for this licensing opportunity. The Committee recommends that this LPAC report be posted on the OSB website and sent to all interested persons identified from the PLIC's work as well as notice given to any other stakeholders likely to be impacted. Links and the deadline for public comments should be readily accessible on the OSB's main page. Following public comment, the Board of Bar Examiners will review both the report and the comments received to give appropriate instruction to Regulatory Counsel regarding the OSB regulations needed to process the portfolio, exam, and practical experience requirements for licensure.

EXHIBIT 1

Paralegal Qualifications for Licensure
 Decision Tree/Flow Chart
 Approved December 12/01/2022 during Public Meeting



Paralegal Qualifications for Licensure
Decision Tree/Flow Chart
Approved December 12/01/2022 during Public Meeting

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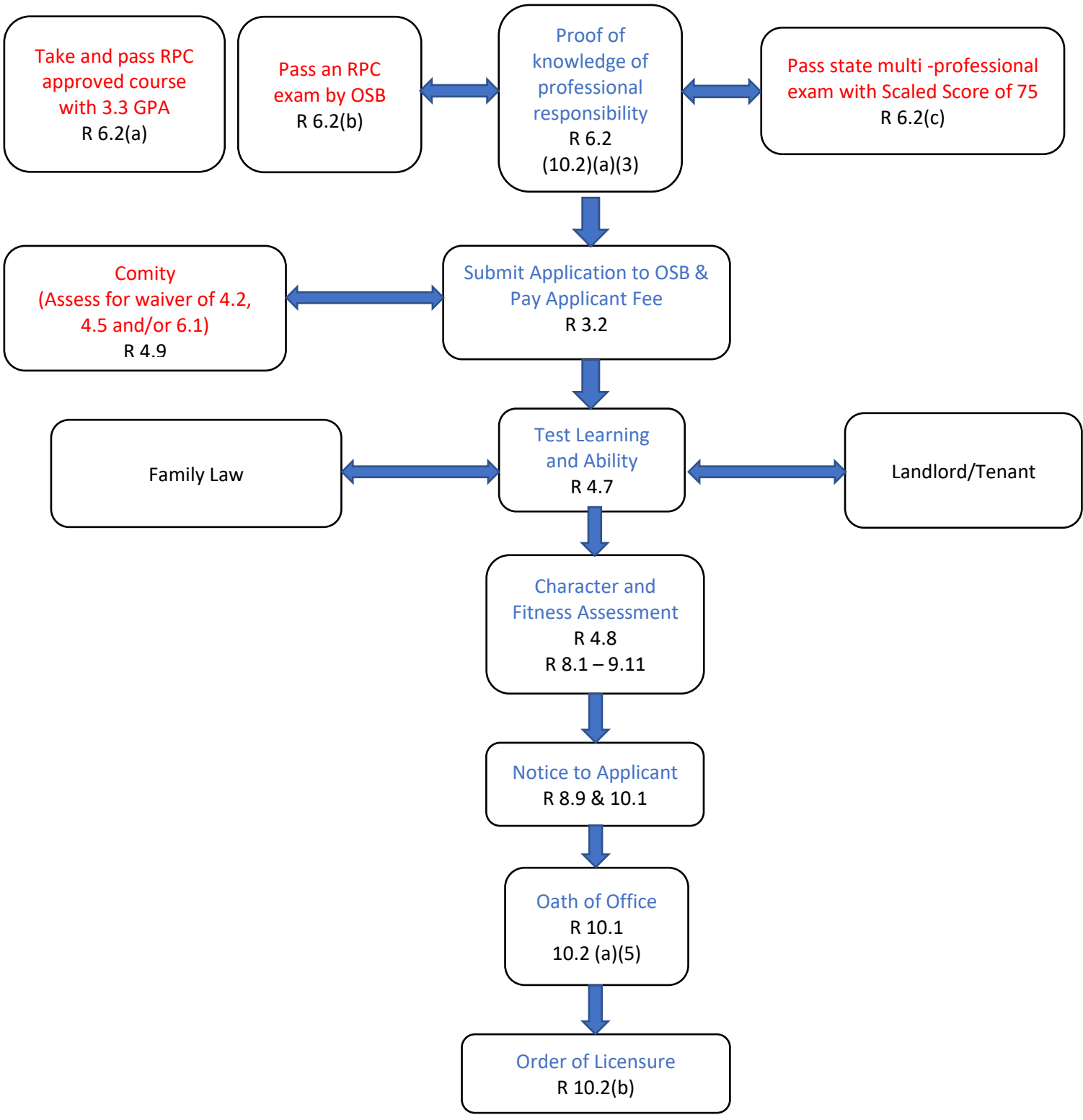


EXHIBIT 2

EXHIBIT 3

LIST OF PARAPROFESSIONAL TASKS QUALIFYING FOR HOURLY REQUIREMENT

Applicants may submit records of work they have performed that they believe should count towards their hourly requirements for licensing. The time spent on the various tasks must be verified by their supervising lawyer. This list is not exclusive; it is intended only to be a guide about what kinds of activities will be credited towards the applicant's hourly requirement. Additional examples may be found in the expansive list developed by the PLIC and which is attached hereto. Applicants may request, and lawyers may certify, that time spent on tasks *not* listed below be credited.

The following list sets forth many common tasks and the category of experience they can count towards. As used below the term "drafting" does not mean basic editing and doing clerical work on other people's materials. It means substantially creating the document or filling in information on a standardized form. Purely clerical tasks, such as taking messages or sending communications that were not substantially drafted by the applicant, do not count towards hours. All activities must have been legal when performed. No activities may include the unpermitted practice of law without a license or the practice of law outside the supervision of a lawyer.

Applicants should show experience in at least five of the following categories.

1. CLIENT COMMUNICATIONS, RESEARCH, AND CASE EVALUATION
 - a. Communicating with, interviewing, screening, and referring potential clients or clients based on firm's practice areas
 - b. Conflict checking
 - c. Discussing confidentiality and limitations
 - d. Conducting intake/getting information from client about their legal needs
 - e. Determining proper Defendant/checking records with secretary of state/property etc.
 - f. Looking up case related information in OECL
 - g. Drafting and explaining fee agreements and retainers
 - h. Working with clients to get information needed to complete documents such as asset lists, uniform support affidavits, rental agreements, correspondence, pleadings, etc.
 - i. Drafting and explaining opening letters
 - j. Discussing and evaluating case with lawyer/advocate
 - k. Researching factual or legal matters and communicating the results to lawyer or clients
 - l. Relaying advice from lawyer to client
 - m. Explaining general legal principles or general court practices and procedures
 - n. Explaining the law relating to family law, protection from abuse, or ORTLA to clients or the public
 - o. Creating client files
 - p. Drafting legal advice letters to clients
 - q. Drafting and explaining non-representation letters
 - r. Calculating and returning unused funds to client
 - s. Drafting and explaining closing letters after representation or assistance
 - t. Drafting contact or close letters
 - u. Reviewing and analyzing rules, statutes, and regulations

2. CREATING OR HELPING WITH DOCUMENTS

- a. Drafting and/or substantially revising pleadings, documents, or applications for use at federal, circuit, tribal, municipal or justice court, or at the agency level
- b. Drafting and/or substantially revising legal documents and forms
- c. Citation checking or fact checking pleadings or other documents
- d. Filling out, or helping self-represented litigants fill out, forms for court or administrative processes including pleadings and applications
- e. Training co-workers including new lawyers, clerks, or other professionals on substantive law, procedures, formatting, or filing of pleadings
- f. Review, analysis, and translation or interpretation of court related legal documents or pleadings from or into languages other than spoken English
- g. Drafting, preparing, calculating, or explaining family law related legal documents such as petitions, modifications, child support calculations, parenting plans, or uniforms support declarations at court or administrative level
- h. Calculation or preparation of taxes, spousal support, witness fees and mileage, debt and asset statements, attorney fee statements or petitions
- i. Drafting, preparing, or explaining landlord/tenant related legal documents such as contracts, rental applications and agreements, or legal notices
- j. Research and drafting of legal memoranda or analysis
- k. Drafting demand or other letters related to legal matters and responding to same
- l. Drafting instructions or explanations of laws for self-represented people
- m. Drafting or helping self-represented persons fill out non-court related legal forms such as powers of attorney, advanced directives, or delegations of parental powers
- n. Creating and presenting educational materials about the law, landlord tenant issues, abuse, or family law for distribution to the public or training other professionals
- o. Property management
- p. Training and experience with subsidized housing regulations or procedures as part of the applicants work or volunteer job related experience
- q. Calculation and payment of filing fees including helping fill out fee waiver applications
- r. Teaching classes for clients or one-on-one work with clients on pleadings
- s. Filing court or agency documents in person or using electronic filing system
- t. Drafting subpoenas, serving, and arranging for service of documents
- u. Drafting alternative service documents

3. DISCOVERY

- a. Requesting, receiving, logging, inspecting, organizing, reviewing, analyzing, marking, responding to, and managing materials for exhibits, discovery, and document production
- b. Work in with clients to obtain various electronic/non-electronic types of documents
- c. Scheduling depositions and preparing notices
- d. Drafting questions for depositions
- e. Creating deposition binders and exhibits
- f. Attending deposition in capacity other than reporter/transcriptionist

- g. Drafting, explaining, serving, and filing discovery motions, notices, requests for production, and responses, and certificates of service
- h. Using or training others to recover, organize, present, or transmit documents, electronic files, emails, text messages, or recordings
- i. Interviewing clients, experts, or potential witnesses, draft summaries of their possible testimony
- j. Investigation and/or research related to legal cases or potential cases
- k. Finding people, evidence, documents, or property
- l. Creating or implementing legal hold for data preservation

4. HEARINGS, TRIALS, AND ADR

- a. Legally representing clients at the state, tribal, federal, or administrative level.
- b. Preparing or organizing narratives, questions, exhibits, documents, or hearing/trial notebooks
- c. Assisting at or preparing for interviews, ADR, negotiations, hearings, trials, mediation or settlement conferences with lawyer
- d. Drafting, analyzing, or explaining agreements
- e. Helping clients understand strengths and weaknesses of case and bottom-line position
- f. Preparing asset/liability statements
- g. Helping lawyers or clients with strategic planning for legal matters
- h. Assist lawyers or clients in presenting cases as legally permitted at tribal or administrative level
- i. Attending ADR, hearings, trials, mediation, or settlement conferences as clerk, or to review with lawyer or client later or to prepare related document
- j. Organizing or labeling documents and exhibits
- k. Finding and working with expert witnesses
- l. Interviewing, preparing, or assessing witnesses, including experts and client
- m. Drafting or filling out subpoenas including calculation of fees and costs
- n. Assistance with trial technology
- o. Representing landlords in state court evictions
- p. Preparation and submission of materials to ALJ or in ADR process
- q. Preparing requests for attorney fees
- r. Explain court/agency rulings as appropriate
- s. Arranging for transcription
- t. Review and evaluation of recordings or transcripts after court appearance

5. VULNERABLE PEOPLE

- a. Explaining common patterns and laws relating to elder abuse, child abuse, domestic violence, sexual violence, and stalking
- b. Supporting self-represented individual in filling out forms for protective orders including explaining or assisting with forms and procedures
- c. Conducting safety planning or lethality assessments for survivors of abuse

- d. Training in and using trauma-informed practices
- e. Exploring ADA accommodations with clients and helping people request reasonable accommodations
- f. Supporting client by attending court hearing
- g. Arranging for interpreter services at court or agency

6. CLEs/TRAININGS/CLASSES

- a. Completing or teaching classes in general legal principles, legal procedures, contracts, discovery, ethics, fair housing, LLT, family law, or other related issues without graduating from a paralegal studies program
- b. Classes in legal terminology
- c. Participation in moot court
- d. Formal training or classes on trauma informed work
- e. Classwork in business or practice management
- f. Classwork on ethics and professionalism
- g. Formal training or classes on abuse reporting
- h. Classes or training on suicide prevention
- i. Training on effective communication and work with with persons who have physical or mental health disabilities
- j. Training on effective communication and work with people who have mental illness
- k. Training on working with interpreters
- l. Training on how to provide correct interpretation/translation
- m. Classes or training on simplified writing, or advanced writing and grammar
- n. Training on effectively communicating with people who have low literacy

7. OFFICE MANAGEMENT

- a. Implementing and following trust accounting principles
- b. Implementing non-trust accounting practices such as payment of bills or balancing non-trust accounts
- c. Managing and negotiating contracts
- d. Coordinating of building maintenance
- e. Budgeting
- f. Calculation, calendaring, and scheduling deadlines, proceedings, appearances, or meetings
- g. Timekeeping and billing for time and/or expenses including collections and accounts receivable and letters or bills to clients
- h. Managing professional (not personal) social media
- i. Using or training others to use timekeeping, database, presentation, document management, client management and related software and technology
- j. Providing technical support either in offices or court for lawyers, judges, or clients

EXHIBIT 4

Exhibit 3

For Report of LPAC to Oregon State Board of Bar Examiners

List of Substantive Paralegal Tasks¹

- Apply legal research to client's particular matter
- Calculate:
 - Child support
 - federal and local estate taxes
 - spousal support requirements
 - witness fees and mileage
- Calendar and docket statutory deadlines.
- Create and balance trust account ledgers
- Create and implement legal hold for data preservation
- Conflict checks
- Communicate with attorneys, experts, clients, opposing counsel, and the courts on substantive matters
- Draft and/or revise legal documents (and in some instances, file with the courts) such as:
 - Abstracts
 - Acquisition and loan documents
 - Advanced Directives or health care proxies
 - Agreements
 - Amendments to bylaws, draft resolutions and stockholder agreements
 - Affidavits
 - Amendments
 - Annual Reports
 - Answers
 - Application for
 - Federal Employer Identification Number
 - Trade name
 - Service mark
 - Copyright
 - Social Security
 - Articles of Incorporation

¹ The PLIC originally designed this list, or one substantially similar to it, as a non-exhaustive list substantive activities. LPAC agrees with this assessment, but also believes that the list is intended to give guidance to supervisors and applicants as to what hours will be counted toward their requirements. Therefore, LPAC suggests removing the “non-exhaustive” adjective. LPAC further suggests that the administrator should establish a process by which this list can be expanded at the request, and through the efforts of, applicants or their supervisors.

- Articles of Organization
- Assignments of Error
- Assignments of Arguments
- Attorney Fee Petitions, including Exhibits
- Ballots
- Bid Sheet for Sale
- Business organization formation documents
- Business reorganization documents
- Buy-sell agreements
- Bylaws
- Capitalization tables
- Case Management Agreement
- Change of Venue
- Child Support Worksheet
- Chronologies and Timelines
- Closing Documents
- Complaints
- Confidentiality Agreements
- Construction Liens
- Contracts
- Debt and asset lists
- Declarations
- Decree of Dissolution
- Deeds
 - Quitclaim
 - Sheriff
 - Trustee
 - Warranty
- Defensive Pleadings
- Demands Letters
- Division of Property
- Divorce, Separation and Annulment documents
- Draft Motion and Orders
- Durable Powers of Attorney
- Exhibits
- Federal Trade Commission (FTC) Disclosure Statements
- Final Order of Divorce
- Franchise agreements
- Franchise offering circulars
- Garnishments
- Guarantees
- Indices
- Interrogatories

- Employment Agreements
- Engagement letters
- Freedom of Information Act (FOIA) Requests
- LLC Agreements
- Lease Agreements
- Legal Descriptions
- Legal Holds
- Legal Memoranda/Legal Analysis, including:
 - Factual issues
 - Legal issues
 - Case citation
 - Sherardizing of case law;
- Liens
- Lien Releases
- Living Wills
- Materialmen's Lien Notices
- Minute books
- Minutes
- Motions for:
 - Contempt
 - Dismissal
 - Modification of Child Support and Visitation
 - Pendente lite
 - Quash
 - Summary Judgment
- Non-Compete Agreements
- Notice of:
 - Appearance
 - Change of officers or directors
 - Compliance
 - Depositions
 - Default
 - Filing
 - Hearing dates
 - Motions
 - Organizational meeting
 - Representation
 - Subpoenas
 - Withdrawal
- Officer Certificates
- Parenting/Financial Disclosure Statements
- Partnership Agreements
- Patent Applications

- Petitions for:
 - Adoption
 - Dissolution
- Pre-trial Orders
- Proxy Documents
- Recordings
- Rental Agreements
- Request for:
 - Admissions
 - Certificates of Existence
 - Copies of Corporate Documents
 - Continuance
 - Production of Documents
- Resolutions (Varying Transactions)
- Responses
 - Interrogatories
 - Requests for Production of Documents
- Restraining Orders
- Public Record Requests
- Satisfactions
- Scheduling Statement
- SEC Filings
- Settlement Agreements
- Show Cause Orders
- Status Reports
- Stipulations
- Stock Certificates
- Stockholder Agreements
- Subpoenas
- Substitution of Counsel
- Summaries
 - Depositions
 - Facts
 - Legal Research
 - Medical Records
 - Witness Interviews
- Surveys
- Terminations
- Title insurance commitments
- Titles
- Title Policies
- Title Transfers
- Trademark Applications

- Trial Memorandums
- Trusts
- UCC filings, including review of security documents
- UCC Financing Statement
- Wage Assignments
- Wills
- Wire transfer
- Witness affidavits
- Writs of Execution
- Factual and Legal Research, including:
 - Audit Inquiries
 - Background Searches
 - Case Law
 - Client Data
 - Criminal History
 - Due Diligence
 - Experts
 - Facts of the Matter
 - Investigations
 - Litigation
 - Locate Parties for Service
 - Locate Witnesses
 - Opposing Party Data
 - Patent and Trademark Office (PTO) Records
 - Public Domain Documents
 - Primary and Secondary Sources
 - Skip Trace
 - Social Media Data
 - Statutes
 - Trademarks
 - Trio or Title Reports
 - UCC Searches
 - Witness Data
- Prepare and Organize:
 - Deposition Exhibits
 - Discovery
 - Hearing Exhibits
 - Privilege Logs
 - Trial Exhibits
 - Trial Notebooks
 - Witness Lists
- Prepare for and Attend (including logistics):
 - Arbitrations

- Contract negotiations
- Corporate Meetings
- Depositions
- Hearings
- Interviews
- Mediations
- Settlement negotiations
- Site Inspections
- Strategic planning of the case
- Transaction Closings
- Trials
- Prepare Client, Witnesses and Experts for Testimony
- Review and analyze (and possibly organize and manage):
 - Closing Books
 - Corporate Databases
 - Court Rules
 - Data Rooms (for corporate due diligence and documents)
 - Discovery and e-Discovery
 - Discovery databases such as Relativity, Eclipse or Summation
 - Electronically Stored Information (ESI)
 - Exhibits
 - Expert Discovery
 - Government Records
 - Medical Records and Billing
 - Opposing Party Discovery
 - Police records
 - Statutes
 - Stock Certificates and Records
 - Tax Records
 - Treaties and International Agreements
 - Wage and Earning Statements
- Schedule and Coordinate with Parties for:
 - Court Appearances
 - Depositions
 - Hearings
 - Interviews
 - Mediations
 - Trials