

Endorsement Form for LP Applications

Instructions

In accordance with [RLP 4.6](#), an applicant must be endorsed in at least one of the following approved Scopes of Practice, by meeting the following requirements:

- (a) **Family Law Endorsement:** An applicant must have completed 500 hours of experience, all focused on Family Law, within the 18 months immediately preceding the submission date of the application.
- (b) **Landlord-Tenant Endorsement:** An applicant must have completed 250 hours of experience, all focused on Landlord-Tenant Law, within the 12 months immediately preceding the submission date of the application.
- (c) An applicant shall not count the same hour toward the completion of a requirement for both 4.6(a) and 4.6(b).

Please fill out the [Endorsement Form](#) above and include with your completed application.

Substantive LP Work Experience Form for LP Applications

Instructions

In accordance with [RLP 4.5](#), applicants must also establish recent substantive paralegal experience, concurrent to any experience required by [RLP 4.2 and 4.3](#), through the following criteria:

- (a) **Admission Based on an Approved Paralegal Education or Bachelor Degree - Substantive Work Experience Requirements:** An applicant seeking admission under RLP 4.2(a) or RLP 4.2(b) must complete 1,500 hours of substantive paralegal experience within the three years immediately preceding the submission date of the application.

- (1) The 1,500 hours must be verified by an active Attorney Member through a Work Experience Declaration form provided by the Bar for such purpose.
- (2) Hours spent training and working within the area(s) of law for which an applicant seeks an Endorsement(s) may be counted towards the minimum hours required in this subsection.

- (b) **Admission Based on a Juris Doctorate Degree - Substantive Work Experience Requirements:** An applicant seeking admission under RLP 4.2(c) must complete 750 hours of substantive paralegal experience within the 18 months immediately preceding the submission date of the application, subject to the following:

- (1) The 750 hours of substantive paralegal experience counted towards the requirement in this subsection may also be counted toward the hours of experience required in one of the Practice Areas related to the Endorsements described in RLP 4.6;
- (2) The 750 hours must be verified by an Attorney Member through the Work Experience Declaration form provided by the Bar for such purpose.

- (c) **Admission Based on Education Waiver – Substantive Work Experience Requirements:** An applicant seeking admission under RLP 4.3 must have completed 1,500 hours of substantive paralegal experience within the three years immediately preceding the submission date of the application, subject to the following:

- (1) All 1,500 hours must be verified by an active Attorney Member through the Work Experience Declaration form provided by the Bar for such purpose.
- (2) Hours spent training and working within the area(s) of law for which an applicant seeks an Endorsement(s) may be counted towards the minimum hours required in this subsection.
- (3) An applicant may count the 1,500 hours required under this subsection toward the completion of the 7,500 hours of substantive paralegal experience required of highly experienced paralegals under 4.3(a).

Please fill out the form below and include with your completed application.

**Attorney Verification via Quarterly Report¹ for
Substantive Paralegal Experience under RLP 4.5
& Endorsement Experience under RLP 4.6**

I, _____ (name of attorney) declare and certify that the following
Individual _____ (name of Paralegal) has
performed the following substantive work hours under my supervision during the below described quarter.

<u>Year</u>	<u>Quarter</u>
☐ 2020	☐ 2025
☐ 2021	☐ 2026
☐ 2022	☐ 2027
☐ 2023	☐ 2028
☐ 2024	☐ 2029

☐ 1 st quarter: Jan – Mar
☐ 2 nd quarter: Apr – Jun
☐ 3 rd quarter: Jul – Sep
☐ 4 th quarter: Oct – Nov

Only count time for Paralegal duties identified in, or similar to, the attached list of Substantive LP Work. LP applicants should highlight items on said list that they included in this report.	Total hours in quarter: _____
² Family Law – focused experience: _____ Hours	☐ <u>included in</u> the Paralegal Duties Hours listed in the first row ☐ <u>in addition to</u> the Paralegal Duties hours listed in the first row
³ Landlord-Tenant – focused experience: _____ hours	☐ <u>included in</u> the Paralegal Duties Hours listed in the first row ☐ <u>in addition to</u> the Paralegal Duties hours listed in the first row

Attorney Declaration for Hours

I hereby declare that the above statements are true and accurate to the best of my knowledge, and do not contain any relevant omissions. I understand that knowingly making a false statement of material fact, or failing to disclose a fact necessary to correct a misapprehension known by me to have arisen in this matter, would violate Rule 8.1(a) of the Oregon Rules of Professional Conduct (ORPC). I further understand that ORPC 8.1(a)(2) requires that I respond to any subsequent lawful demand made by the Oregon State Bar for information related to LP Applicant’s application, or regarding the representations made in this Declaration.

Signature of Attorney

Date

OSB Member No.:

¹ This form should be used to verify only the required 1,500 hours of substantive paralegal experience required of applicants and any endorsement hours required under RLP 4.6. Do not use this form for hours intended to qualify an applicant for the Experienced Paralegal Education Waiver. Instead, use the form entitled “Highly Experienced Paralegal Education Waiver.” There should be a quarterly report submitted for each quarter in which the applicant performed work towards the 1,500 hours required, but no more than 12 quarterly reports may be submitted for one applicant.

² Experience intended to count towards Family Law Endorsement must have been completed within six quarters of filing an application.

³ Experience intended to count towards Landlord-Tenant Law Endorsement must have been completed within four quarters of filing an application

LIST OF LP 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. 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.

The following list sets forth many common tasks and the category of experience that can count towards substantive paralegal experience. 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 unauthorized 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 uniform 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