

Meeting Minutes

**Utah Supreme Court's Ad Hoc Committee on
Regulatory Reform
Licensed Paralegal Practitioner Workgroup
January 8, 2026
Noon to 1pm
Remote**

Attendance: Maryt Fredrickson, Nick Stiles, Bre Hickerson, Lindsey Brandt, Jon Wayas, Andrea Donahue, Michael Barnhill, Jackie Morrison, Andrea Donahue, Lindsey Brandt, Judge Koch

1. Welcome and Review of Meeting Minutes (Tab 1 of agenda)
 - Minutes were reviewed and approved.

1. Discuss Moving Away From Form Practice
 - Jon began our discussion on the current LPP's Form Based practice.
 - Jon shared UCJAA 14-802(c), which outlines LPP's "authorized activities." One such activity is that LPP's can "complet[e] forms approved by the Judicial Council or preparing documents that are consistent with the relevant portions of the Judicial Council-approved forms."
 - Jon highlighted that form availability has been a major challenge for LPPs. When LPPs need a form that is no longer available or perhaps didn't exist yet, the Bar has assisted in drafting relevant forms and getting approval from the LPP Committee and other relevant parties to approve. That is not sustainable and the Bar does not have the resources for that process. Without OCAP, there is no central system for form creation/management anymore. It would cost thousands of dollars for the bar to outsource the maintenance of the forms. These limitations are one reason why we are considering moving away from forms-based practice for LPPs.
 - Jon explained that there were reasons to limit LPPs to forms-based practice initially, such as efficiency, clarifying the LPP's scope, attorney concerns, etc.
 - There was some discussion of the signature template on the forms, for both LPPs and attorneys, and whether LPPs can sign documents used to support a form.
 - Jon noted that the Bar has not seen a lot of pushback when amending rules lately, but expanding LPP's scope may generate some pushback from attorneys. He also noted that judges have requested that LPPs have more authority and that their authority be clarified. Lindsay noted pushback within

the family law bar. Judge Koch said that pushback is likely inevitable but that we could consider expanding LPP scope in debt and housing cases, where attorneys are not practicing, before expanding in family cases to see how it goes because there would probably be more pushback in the family law space. Jon agreed, but he noted that there are not a lot of LPPs in debt or housing right now. Those are the practice areas with the most demand, but they are the hardest areas to make money as an LPP so it is hard to incentivize people to do that.

- Nick reiterated the A2J goals that vary between CJAs and LPPs. CJAs are better suited for people who can't pay (e.g., debt and housing cases). LPPs are more prominent in family law because people can usually afford to pay something for those services. There may be a preference to actually restrict LPP practice to family law and one other area, but not evictions and debt collection.
- Lindsey agreed with Judge Koch that expanding LPP's scope in debt and housing areas could be helpful. For example, she suggested that we could consider including small claims cases in LPP's scope. That might help encourage LPPs to consider working in those areas.
- Andrea noted that CJAs are authorized to work in debt cases and echoed Nick's thoughts on distinguishing between LPPs and CJAs. She also highlighted that sometimes the boundaries we believe are clear get blurry in practice. As we work to clarify the scope of each role, we should be mindful of that.
- Michael noted that there doesn't seem to be a difference in his mind between a non-lawyer collections manager representing a bigger corporation and an LPP representing a client being sued for debts. On the other hand, he explained that in an arbitration he's working on in NY, there is a non-lawyer representing a client in FINRA case and that it has caused a lot of issues and delays. He concluded that he really wasn't sure how to resolve this issue yet.
- To wrap up the forms discussion, Jon highlighted what Arizona and Colorado are doing. Neither state restricts their LPs/LPPs practice to forms. Colorado allows LPPs to use forms or templates that are generally accepted by courts but does not restrict LPP practice exclusively to forms.
- Jon also explained that the LPP committee is contemplating options for LPPs, such as tying their scope to a commissioner-based practice. That is challenging because there aren't commissioners in every district of the state right now.

2. Review of Draft Bullet Points (Tab 2)

- Nick noted that Courtney and other members of IAALS are advocating for a uniform name for LPPs and we should be mindful of that.
- Andrea noted that if we keep bullet 1 as including “successful” LPP programs in other states, we need to define what success means. Maryt agreed and said that we could just remove the word “successful.”
- Michael discussed the experience-based waiver for the education requirement. He said that he would not characterize the new alternative pathway to licensure for lawyers as an education-waiver, since lawyers still must have gone to law school to qualify for that. Nick noted that the Bar is hesitant to characterize the alternative licensure program as an A2J initiative or the reg reform effort. The Committee agreed that we should remove (2)(iii) from our bullets to eliminate reference to the alternative licensure program. Instead, we can emphasize bringing back the experience-based pathway that we originally had in Utah.
- Nick noted that in this legislative session, there has been discussion about restructuring our judicial districts. If the legislature decides to restructure those districts, that could be an opportunity for us to advocate for commissioners in every district if we feel strongly about LPPs having a commissioner-based practice.
- In reviewing our recommendations at section (4) of the bullet points, Lindsey recommended that we consider maybe combining (iii) and (iv) to clarify the difference between CJAs and LPPs.
- Andrea highlighted a topic for ongoing discussion about how “to preserve existing Sandbox practices post Sandbox” and asked what we meant by that. Maryt noted that this was intended to capture the entities that don’t fit within the LPP/CJA realm and how we can look ahead to deal with that. Andrea recommended we be very precise in how we talk about this topic and suggested we reword this section to something like “how to best address the additional types of alternative legal providers created through the Sandbox (outside of LPPs and CJAs).”
- Jon mentioned that we should think about reciprocity rules with other state programs as well. That is something we have not yet addressed in Utah at all. Nick agreed on that. Nick asked if the LPP exam is Utah-specific, and Jon told us that the exams are. That would be a challenge we would need to think about if considering a reciprocity rule.

3. Action Items and Conclusion

- Maryt noted that because we are working on a larger joint meeting with all workgroups in February, we may or may not meet as a small group in February.