



## **ElderCounsel Listserv Protocol**

ElderCounsel's listservs provide members and non-members alike a venue to generously share ideas, stories, resources, and expertise day in and day out. The dialogue that occurs here daily and the knowledge gained from that dialogue is extremely valuable to all who participate.

From time to time it's important to remember a few things about online communities in general, and our listservs in particular. Please take note of the following as you continue to participate in ElderCounsel listservs:

### **Don't neglect your independent research skills**

- The ElderCounsel listservs serve as a convenient means of communication among our membership on a wide spectrum of elder law and special needs planning issues. Members who are new to these areas (which we all have been at some point) can tap into the deep well of knowledge and expertise of our more experienced members. In order for all members to get the very most from the listservs and to avoid rehashing certain issues that have either been discussed at length or which can be quickly resolved with minimal research, please do your best to utilize online research tools as well as your own research to ensure that the issue is not one you can resolve quickly with a little independent research. Please do not post the same email to multiple listservs. Identify the most appropriate listserv and post there only.

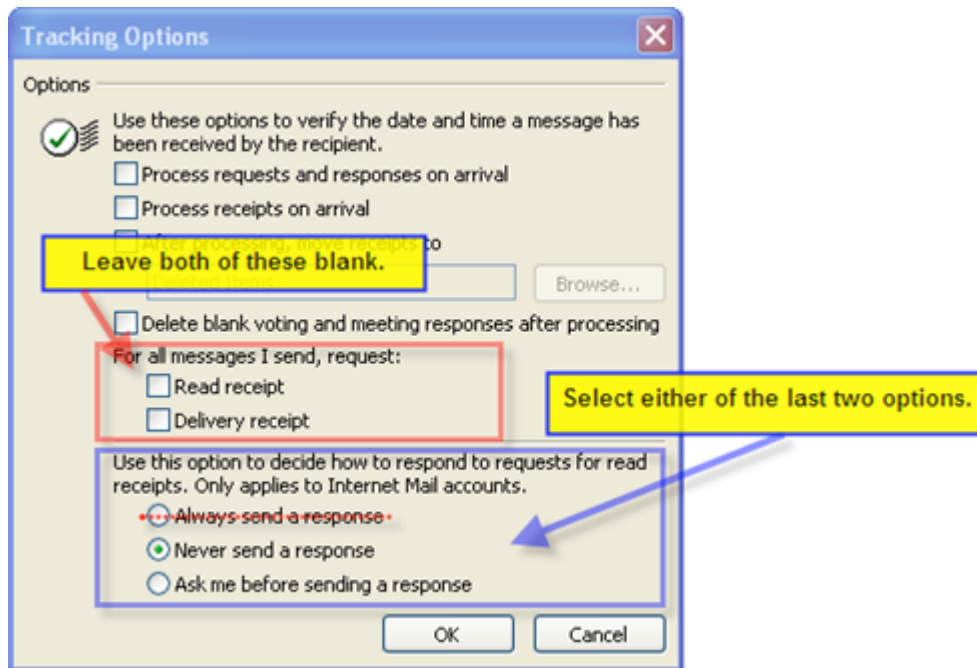
### **Don't use an "Out of Office" auto reply when you travel**

- If you're going to be away for a few days and don't want your inbox to be flooded, contact [support@ElderCounsel.com](mailto:support@ElderCounsel.com) and ask to be temporarily removed from the listservs. (We promise you can get back on when you return.) If you don't want to do that, at least spare your fellow listserv participants from receiving an "Out of Office" auto reply message while you're away.

**Include a signature block that identifies who you are, your firm name and contact information.**

## Don't Request Email Read Receipts, Delivery/Open Confirmations, etc.

- Similar to the “Out of Office” reply, sometimes it’s nice to know whether or not an email message has been read by the recipient. However, requiring a “Read Receipt,” “Delivery Confirmation,” “Open Confirmation,” or any other setting that generates an automatic response from the recipient causes a great deal of clutter on the listservs. Make sure your email is configured in such a way as to prevent these types of automated responses. If you use Outlook as your email application, check your email settings by going to “**Tools>Options>Preferences>E-mail Options> Tracking Options**” and make sure your settings look like this:



## Post only what you want to share

- One of the most valuable functions of the listserv is that participants will so openly share forms, notes, schematics, and other valuable files with each other. In order to preserve an archive of these resources, ElderCounsel reserves the right to review any attachment posted to any ElderCounsel listserv, and if appropriate, to add the attached file to our members’ Knowledge Base. We may (or may not) edit the submission for form and basic content before posting the file to the Knowledge Base. When possible, we will acknowledge and give credit to the original contributor and/or author of the attached file, and we may use the attached file in any way we deem appropriate for the mutual use and benefit of ElderCounsel members. However, if the posted material is subject to a copyright held by someone other than the person who posts the file to the listserv, we will not post the materials without the prior consent of the copyright holder.

## **Appropriate Subject Lines**

Please make sure your post has a descriptive heading to allow others to either filter the post or disregard it if it is not pertinent to them. If you are asking a question about a particular state, please note that in the subject line, i.e.: “TX question on promissory notes.” A question about Veterans Benefits may have a subject line like, “VA benefits-sale of home.”

Please do not respond to a post with a separate question. Instead, start a new post with a different subject line.

## **If you have something to sell, there is a Marketplace for you**

Posts that solicit business from other listserv participants are prohibited and are subject to “Corrective Action for Inappropriate Posts” as outlined below. If you have some great ideas on how members can improve their practices, serve clients better, have a better life, etc. and you want to share that information and those resources with others and with no strings attached, by all means, please share. However, if you want to charge for that information, contact [lisa.evans@eldercounsel.com](mailto:lisa.evans@eldercounsel.com) and learn about advertising on the ElderCounsel marketplace.

## **Offensive comments, jokes and any other information that does not constitute asking or answering a legal question is strictly prohibited.**

Posting any type of information that, in the sole discretion of ElderCounsel, constitutes an offensive comment, joke or any other information that does not involve asking or answering a legal question is strictly prohibited and may result in removal from the listserv.

If you have a question about whether a post is appropriate, please contact our Executive Director, Valerie Peterson, at [Valerie.peterson@eldercounsel.com](mailto:Valerie.peterson@eldercounsel.com) or by phone, 888-789-9908 x81.

## **Corrective Action for Inappropriate Posts**

If information that is inappropriate as outlined in the paragraphs above is posted to a listserv managed and operated by ElderCounsel, a written and/or oral warning will be given to the person who posted the comment, with notice that further inappropriate posts will result in immediate removal from the listserv.

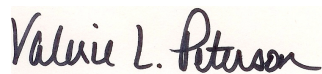
If inappropriate information is posted a second or subsequent time, the person who posted the email will be removed immediately and no longer able to participate in any listserv managed and operated by ElderCounsel until such time as ElderCounsel determines.

## **Basic email rules you should already know**

- Don’t assume that your fellow listserv participants know who you are. Make sure that ALL emails you post to a listserv contain a *full identifying signature* (name, title, mailing address, and email address) at the bottom.

- TYPING IN ALL CAPS AND WITH REALLY POOR GRAMMATICAL USE AND RUN-ON SENTENCES AND FRAGMENTS is equivalent to yelling and makes for distracting reading. Use traditional capitalization, punctuation, and grammar when possible.
- Don't use active "emoticons" or animated graphics in signatures and avoid including ActiveX controls or Java applets in emails posted to any ElderCounsel listserv. Similarly, refrain from using signatures containing embedded solicitations, links to "get free emoticons" and similar matters.
- When replying to emails that are not of general interest (such as requests for attorney references, co-counsel opportunities, "thanks for the information," etc.), direct your reply off-list only to the person who posted the message, rather than posting a general reply to the listserv.

Thank you for your cooperation, and for your participation in ElderCounsel's online community.

A handwritten signature in black ink that reads "Valerie L. Peterson". The signature is written in a cursive style and is set against a light yellow rectangular background.

Valerie L. Peterson, Executive Director  
[Valerie.peterson@eldercounsel.com](mailto:Valerie.peterson@eldercounsel.com)  
888-789-9908 x81