

Sixty-Six
Solid Tips
From Your
Virtual Paralegal
SUCCESS TEAM



Compiled and Produced by
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www.virtualparalegaltips.com

Introduction

Technological advances have allowed both attorneys and paralegals to become mobile and virtual. Thus, the virtual legal world is really coming into its own.

At the same time, clients are demanding cost-effective legal services.

The effective utilization of highly experienced and properly trained virtual paralegals is clearly the best avenue for the legal community to practice law both efficiently and economically without incurring any employee overhead that is traditionally passed on to clients.

Whether you are an attorney seeking to contract with a virtual paralegal, or you are a paralegal seeking to build your own virtual business, these **Sixty-Six Solid Tips From Your Virtual Paralegal Success Team** are sure to help you with your journey.

What is a Virtual Paralegal?

The American Bar Association (ABA) defines a legal assistant or paralegal as a person, qualified by education, training or work experience who is employed or retained by a lawyer, law office, corporation, governmental agency or other entity and who performs specifically delegated substantive legal work for which a lawyer is responsible.

The Virtual Paralegal meets the definition adopted by the ABA and, in addition, possesses the skills and expertise to perform this work in a virtual setting, usually from a fully equipped remote office as an independent contractor.

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Why does hiring a virtual paralegal make good business sense for attorneys?

“Michelangelo should not charge Sistine Chapel rates to paint a farmer’s barn.”

Urisic v Bethlehem Mines, 710 F2d 670 (3rd Cir. 1983)

WHY WORK VIRTUALLY?

Pamela J. Starr, CBA

RESOURCES FOR GOING VIRTUAL

Joy Wilder

1. Control over your life. Becoming a virtual paralegal allows you to have more flexibility in your life. You control your hours; choose your clients (hire and fire attorneys ☺); focus on the areas of law that excite you; and still have time to do the things that make you happy.

2. It is the natural evolution of the industry. We live and work in a virtual society – connected by our smart-phones and computers. Lawyers communicate with their staff via e-mail and text; attorneys and paralegals telecommute; courts are embracing technology and electronic filing. Going ‘virtual’ is the logical next step.

3. Freedom to be creative. Being a virtual paralegal gives you the opportunity to develop your own voice; to become an expert in your field; to practice in the areas of law that are meaningful to you; to blog, write, present, teach, or whatever your passion may be.

4. No more rush hour blues. Working virtually means your office is your laptop – no need to sit in endless hours of traffic. Your commute can now be to your favorite wi-fi spot or the comfort of your home office. No more wear and tear on your car, high gas prices or hunting for a parking space.

5. It is good for the environment and for you. It is the green alternative. No driving, therefore no gas emissions. The virtual office is mostly paperless, thereby saving our forests and reducing waste. Best of all, working virtually reduces the stress in your life by giving you back the control you lost when you were a cog in someone else’s machine.

Pamela J. Starr is the founder and solopreneur of STARRParalegals, LLC. Applying 25+ years of paralegal experience, Ms. Starr and STARRParalegals provide virtual paralegal services in Bankruptcy & Creditors' Rights, Commercial Transactions, and UCC, to attorneys and law firms nationwide. Pamela is a current member of the Georgia Association of Paralegals ("GAP"), and a previous member of the Legal Assistants Division of the State Bar of Texas. In October 2006, Ms. Starr joined the Association of Bankruptcy Judicial Assistants ("ABJA"), earning her official recognition as a Certified Bankruptcy Assistant ("CBA"). Since 2007, Pamela has served on the Faculty of, and as an Advisory Board Member at, the Institute for Paralegal Education ("IPE"). She has been a featured speaker at numerous national and state-wide paralegal events, has been published in the *National Paralegal Reporter*, and has been considered a leader in Atlanta's paralegal community for over 13 years.

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1. Build your social networking army. Twitter is an excellent place to start social networking for your growing business. Search for “virtual assistant” and “virtual paralegal” and then follow professionals in those categories to see how they promote their business. You may also want to follow their friends. Ask questions! Many people on social networks will guide you to the information you need.

2. Utilize your local library. Reference librarians can lead you to many free resources available to entrepreneurs. Additionally, start-up costs can be enormously lowered by borrowing business and computer books, magazines, newspapers and audio books rather than purchasing them. Free internet and wi-fi may be available, as well.

3. Search for blogs written by virtual paralegals. Many virtual paralegals have created blogs dedicated to their business. These blogs will offer valuable information for launching and operating a successful virtual paralegal business. Some have also created products that will help you.

4. Check your government websites for small business start up help. Many local, state and federal governments offer assistance to new businesses, such as loans, start-up seminars, educational services and employment opportunities.

5. Contact your accountant. A good advisor can give you guidance specifically targeted to small business tax needs, how to prepare for upcoming taxes, what governmental offices to contact, record keeping advice and more.

Joy Wilder is the owner of Wilder Office Approach, a paralegal business based in the Chicago area. An accomplished litigation paralegal, Joy not only focuses on legal office support, but also general office assistance and social media marketing.

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Business Plan Basics

Cathy Ribble CP

1. Educate yourself. The internet is full of wonderful resources that will help you grasp and define the basics of starting and managing your small business. Some favorites include:

www.bplans.com
www.paloalto.com/sba/course.cfm
www.sbtv.com

2. Establish elements of your plan. Your Business Plan should include the following key elements. Start wherever you are inspired, and then step back to review the finished product. You cannot know where you are going unless you define a destination.

Executive Summary	Strategy & Implementation
Company Description	Web Plan Summary
Product or Service	Management Team
Market Analysis	Financial Analysis

3. Execution of the details is critical. Your written plan should become your guide for the development and operation of your business. Following a plan makes certain that you end up where you want to be instead of drifting. A simple, specific and complete plan will be easy to follow.

4. Expectations must be realistic. There will be bumps along the way. Keep those to a minimum by outlining the specific baby steps required to complete the marathon. Give yourself specific attainable deadlines.

5. Expand and redefine your goals. Naturally your strategies, plans and analysis will change as you develop your business. Keep going back to that business plan. Perfecting the *written* plan will force you to step back and analyze the big picture from a business management perspective. Schedule a business review on your calendar to check your progress and update your plan.

Cathy L. Ribble is the visionary behind Digital Paralegal Services, LLC. She earned her Certified Legal Assistant (CLA) title from the [National Association of Legal Assistants](http://www.nalaweb.org) early in her career. In 2009, she re-established that professional certification by earning her Certified Paralegal (CP) title and then founded Digital Paralegal Services to provide virtual paralegal support to attorneys throughout the United States. Cathy has worked as a legal professional in traditional law firms in Texas and Oklahoma for over 15 years, and she specializes in Civil Litigation.

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Sensible Software Options

Laurie Mapp

1. Open Office Suite A wonderful, FREE alternative to Microsoft Office. Especially good when you are first starting your practice! (<http://openoffice.org>)

2. Express Scribe Transcription Software Another free choice that allows you to easily transcribe digital dictation files for your clients. (<http://www.nch.com.au/scribe/>)

3. Chrometa Super easy to use and reasonably priced time tracking software perfect for anyone in the legal field. (<http://www.chrometa.com/>)

4. SnagIt Image capture software that can be surprisingly handy - especially when putting together blog posts or e-books! (<http://www.techsmith.com/>)

5. SaaS (software-as-a-service) rules when you are starting a virtual paralegal business as it is low-cost, no contract and doesn't take up all your hard drive space!

Laurie Mapp is a busy mom of three boys who started her virtual legal assistant business in the fall of 2008. She loved her career as a legal assistant/paralegal, but wanted the challenges and flexibility that would come from owning her own business. Laurie works with lawyers from all over the US and Canada, and especially enjoys her work with home-based and solo law practitioners.

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Equipment You Can't Live Without

Melodee K. Currier

- 1. Laptop or desktop computer.** Be sure to buy as much hard drive and RAM memory as you can afford. Computer storage can fill up fast.
- 2. Large screen monitor.** My monitor measures 22" and is so easy on my eyes. Screen size is measured diagonally from corner to corner.
- 3. All in one printer, copier, scanner, fax.** These are now very affordable and replace 4 individual machines. Copier/print functions now usually do both color and black and white prints. You can usually do photos, too.
- 4. Telephone with a business line (and answering machine or voice mail).** Most are equipped to take up to two lines. You'll need one line for your fax and one for voice mail.
- 5. Back Up Drive.** This is a **must** to protect the data on your computer. It is easy to hook up and use. ALWAYS back up your data – daily is best.

Melodee K. Currier, President of eTrademark Paralegal Services, LLC, is a 1989 graduate of the Florida Atlantic University Paralegal Program in Boca Raton, Florida. She has over 25 years' Intellectual Property experience working in the corporate Legal Departments of Owens-Illinois, IBM and Wendy's International. From 2002 to 2008 she was a paralegal at Wendy's, solely responsible for its entire U.S. and International IP portfolio, including its subsidiaries, Baja Fresh and Cafe Express. She formed eTrademark Paralegal Services, LLC in 2007, offering superior virtual trademark paralegal services to trademark attorneys.

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Why Use A Virtual Paralegal?

Dana Fortier

- 1. Manage your calendar.** A virtual paralegal can manage meetings, hearings, and other calendar items, be sure they are confirmed, and inform the attorney of any issues that have arisen. These tasks can often be accomplished with a few phone calls and emails, thereby leaving the attorney free to continue day-to-day business.
- 2. Manage your email.** A virtual paralegal can check the attorney's email, delete the 'junk' and assign tasks to staff, thereby leaving the attorney free to continue the practice of law.
- 3. Create and manage your social media plan.** Social media is a great free, or next to free, way to advertise and get known. A virtual paralegal can search for blog posts and articles that would be beneficial or interesting to the attorney's practice area, prepare responses to blog posts and articles (especially discussions on LinkedIn) and even write blog posts! After the blog is posted, the virtual paralegal can utilize LinkedIn, FaceBook, Twitter and other resources available on the web to ensure that the message is reaching a wide circle.
- 4. Provide that "something extra" to help your office staff.** Having a virtual paralegal as "back up" can provide a sense of relief to the attorney's staff. Staff knows that if there's something that needs doing that they just can't get to – the virtual paralegal can often step in and fill in the gaps. Virtual paralegals invest themselves in the continued success of the attorney's practice.
- 5. Plan your special events.** Even with these challenging economic times, the attorney may want to do something for staff or clients. Using a virtual paralegal to plan this event will take the pressure off of the attorney. Many virtual paralegals have experience planning corporate events and resources to plan a great event within budget.

Dana Fortier, Owner and Virtual Business Manager for Fortier Business Solutions, began her professional career at the age of 16 working in a boutique law firm in Oklahoma City, OK. After working in that law firm through high school and into college, she attained her Organizational Management degree and continued her career as a legal assistant and finally as a litigation department supervisor after moving to Michigan in 1995. In her virtual project management business, Dana works closely with clients to organize projects, ensuring that all details are finalized, and all aspects of the project are closely monitored.

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Marketing in a Virtual World

Tina M. Hilton

- 1. Strive to become an expert.** Providing useful information through a blog will showcase your expertise in your chosen niche.
- 2. Collaborate with people, especially those in your target market,** by offering to do things like guest posting on their blog. Not only will they think of you as “that helpful VA”, this will make you visible to their readers who might also be in your target market.
- 3. Interact with as many people as you can** via commenting on blogs or interacting through social media. The more people who begin to recognize your name and what you do, the better.
- 4. Be on the lookout for ways that you can assist others.** If someone asks for help via Twitter/blog/social media and you can give them an answer, be quick to respond.
- 5. Communicate offline** by setting up friendly phone calls with those you’re making connections with online. If they live near you, meet for coffee and chat.

Tina M. Hilton is sole-proprietor of Clerical Advantage Virtual Assistance Services. Her background in various professional industries, computer and internet experience and professional training combine to give clients knowledgeable and experienced administrative services. She opened Clerical Advantage Virtual Assistance Services in September 2007 and has successfully served clients across the country in fields varying from attorneys to non-profit organizations.

In early 2009, Tina narrowed her focus to concentrate on providing services to legal professionals and business creatives with a strong emphasis on assistance with blog, social media and education marketing. She also began speaking locally to small groups, educating them on the subject of virtual assistance.

Her love of writing led her to obtain a certificate in Creative Writing and she is a contributing editor to the Internet Magazine, [Home Office Warrior](#) and [Blog for Profit](#); both published by attorney Grant Griffiths. She also built and writes the blog, [My Boomer Community](#) for the print magazine, [The Baby Boomer News](#). She maintains her own business blogs both on her [website](#) and on [ActiveRain](#) and has written and published an [e-book](#) entitled “An Introduction to Virtual Assistance for Businesses”. She was recently named to the faculty at [Solo Practice University](#), where she teaches a course on the benefits of using a virtual assistant in a solo or small law firm.

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Networking Through Social Media

Kristina Duncan

- 1. Don't be overwhelmed by social media.** You don't have to do everything at once. Pick one and try it out.
- 2. Join LinkedIn.** It is the easiest way to get started networking using social media. Join groups in areas of the law that interest you. Ask questions in the groups. Answer questions. Start conversations.
- 3. 3 words: Tweet, Tweet, Tweet.** Create a Twitter account. Find other legal tweeps to follow by searching or using sites such twello.com. Tweet articles that are interesting, ask questions, be yourself.
- 4. Have a blog.** Write about what you know. What developments are going on in the paralegal profession? Maintain it. It doesn't have to be every day, but be consistent. Read other blogs and leave comments.
- 5. Remember that everything on the internet can be seen.** Keep it professional. Keep it clean. Don't say anything insulting. Remember, if you have nothing nice to say, don't say anything at all.

Kristina Duncan is the owner of Paralegal Associates. Previously, she worked as the sole assistant for two attorneys in personal injury and employment law. While working full-time, she attended the University of San Diego's Paralegal Program, graduating in June, 2008 with Honors.

A California native who has recently relocated to the East coast, she attended the University of California, Irvine where she studied dance and psychology. She was a professional ballet dancer, performed in many musicals, taught dance, trained in and taught gymnastics, played on several soccer teams (including being team captain for a season), was on a swim team, and was a competitive ice skater for 6.5 years.

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Essential Steps to a Solid Launch

Karen E. Howe, CP ACP

1. Do your research. Study your market, that is, the attorneys you will be offering your services. Determine who your competition is, what they are offering and what is it that makes you're offering different.

2. Prepare a business plan. There's a saying "If you fail to plan, then you plan to fail." Forms and guidance for creating your business plan can be found for free on the internet.

3. Be Prepared Financially. Be sure you have set aside 6 months to 1 year of income. Because you will not have a lot of business in the beginning, consider securing a part-time job to supplement your income. Be prepared to put in long hours, work weekends and forego holidays in the short term.

4. Keep Marketing Costs Low. You can do your own marketing for little to no cost. Here are a few examples:

- (1) Get free business cards from www.vistaprint.com
- (2) Create a marketing list from your state's bar association website. Create postcards at vistaprint.com and mail them to the prospects on your marketing list. Be consistent. Marketing should be done every 3 months in the beginning.
- (3) Join attorney associations who accept affiliate paralegal members. Go to the meetings with business cards in hand and be prepared to soft sell your services.

5. Keep Overhead to a Bare Minimum. In the beginning, work from home if possible and do not buy expensive equipment and software. Utilize free resources such as your local law library, the internet and the network of legal professionals from your many years of experience.

Karen E. Howe, CP, APC, is the managing member of Wealth Counselor's Advantage, Ltd. providing paralegal and accounting support services to attorneys and accountants for over 5 years on a contract or freelance basis. She previously worked as an in-house paralegal for 10 years specializing in the areas of estate planning, estate administration, fiduciary tax, fiduciary accounting, and trust administration.

Karen received a B. A. degree in Legal Administration from The University of West Florida in 1994. She earned the Certified Paralegal (CP) designation in 1997 and the Advanced Paralegal Certification (APC) in Probate, Estate Planning and Fiduciary Tax in 2000.

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Tips for Working From Your Home Office

Vicki Voisin, ACP

1. Create a dedicated workspace. This space should allow you privacy and used only for your work. You may not need a whole room for your office but do avoid working at the kitchen counter or on a coffee table in your living room.

2. Plan your day. Schedule your day so you know when you'll be doing your work and when you'll take care of personal tasks. Set deadlines to get your work done. Bundle tasks that will take only a brief time, such as returning telephone calls and checking e-mail, so that they're done all at once. When you have a meeting out of the office, schedule your errands that day so you're not running out every day.

3. Limit interruptions. Let your family know when you will be available to them. Let your answering machine take messages so you're not interrupted by calls from friends during working hours. Focus on your work so you don't interrupt yourself by stopping for a snack or to start a load of laundry.

4. Eliminate distractions. Clutter may distract you from your work so keep your work space organized. This will also eliminate wasting time searching for lost items. Be sure you have enough storage space for your supplies. Your home office is also no place for a television or radio. Turn off the message notification signals on your email so you're not tempted to stop and check it haphazardly.

5. Take a break! Working from home means you'll be sitting for long hours in front of your computer. This is tough on your eyes, back and neck. Take a break to stretch every hour. Try to schedule time for exercise. Also, be sure to avoid isolation by getting out and meeting friends and colleagues.

Vicki Voisin, also known as The Paralegal Mentor, delivers simple strategies for paralegals and other professionals to create success and satisfaction by setting goals and determining the direction they will take their careers. Vicki spotlights resources, ethics issues, organizational tips, and other areas of continuing education to help paralegals and others reach their full potential.

She publishes a weekly ezine titled *Paralegal Strategies* and co-hosts *The Paralegal Voice*, a monthly podcast on Legal Talk Network (www.legaltalknetwork.com).

Vicki blogs at www.paralegalmentorblog.com and is the producer of *The Virtual Paralegal Interview Series* <http://tinyurl.com/VPInterviewSeries>

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IMPORTANT TRAITS FOR WORKING VIRTUALLY

Denise Shears

1. Commitment. You must be able to follow through on what you tell your client you are going to do. You also have to be committed to give your all to the job you do.

2. Communication. Since you are not face to face with your client (or VA), good communication is essential. There need to be set processes and procedures for communicating with one another – via email, telephone, or a mix of both.

3. Organization. Organization is the key to a smooth running office. If you have to scramble to find an important paper or miss a deadline due to distractions, you need to be more organized.

4. Initiative. In order to work from home, you have to have the initiative to get up and get to work. Sometimes knowing that you don't have someone looking over your shoulder can make you a little lackadaisical, which then tends to show up as sloppiness in your work.

5. Ability to spend long time periods alone. When you work virtually, you don't go out to an office. You don't have co-workers to chit chat around the water cooler with. You don't even have anyone to bounce ideas off. So, if you don't like being alone for long periods, virtual work may not be the best fit.

Overall, the same traits for being a great paralegal in the brick-and-mortar world are the same traits that will make you a great virtual paralegal. You just have to be little more proactive with some of them!

Denise Shears has worked in the legal field since 1992. She is the owner of Shears Virtual Advantage, a legal administrative business aimed at solo attorneys, with an emphasis on bankruptcy petition preparation.

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DESIGNING YOUR WEB SITE

Dawn M. Draper

1. Web Site Title. The title of your web site is what people will see when they are viewing a listing on the search engines. So, the title needs to be kept clean, precise to the business and professional looking to the viewer.

2. Description and Keyword Tags. Every web page in your website should include a code for "Meta Description" and "Meta Keywords". Meta Keywords are used to tell the search engine the individual keywords a searcher will type into the search engine.

3. ALT Tags or Alternative Tags. In order for the search engines to see your photograph or graphic, an ALT Tag must be associated with your image. This allows the search engine to find more keywords that associate your web site with what the searcher is looking for, as the ALT Tag is a text description of your image.

4. Text vs. No Text. Search engines index your web site page by the text presented on that page. The more descriptive you are about the product, services and location of your business using text, the more apt you are to be indexed by a search engine when an individual types in their keywords.

Dawn M. Draper is the owner of "The Virtual Paralegal". She graduated from Northwestern Michigan College in 2000 with an associate in applied science degree and legal assistant certificate. In 2003, she graduated from Davenport University with a bachelor of science, majoring in paralegals studies. She has worked as a legal secretary and paralegal for law firms for over 13-years. She owned a web design business for 13-years, designing commercial web sites, blogs and ecommerce shopping carts. In 2006, she received a certificate in search engine optimization. She research for "The Virtual Paralegal" in January, 2008. She designed her company's web site, launched it, and had her first attorney client in the first month. Today, she has eight attorney clients and one subcontract position with a condominium management company. Dawn has also published an ebook, "How to Become a Successful Virtual Paralegal", which is available at <http://www.thevirtualparalegal.com/ebook.htm>.

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FOLLOWING ETHICS RULES

Laura Alvarez

Ethics are not a matter of following one's feelings, following the law, or identified with religion, or doing what society accepts.

Ethics are standards of right and wrong that prescribe what humans ought to do in terms of rights, obligations, benefits to society, fairness, or specific virtues.

(Velasquez, M. Andre, C. Shanks, S., Initials (1987), What is ethics? *Issues in ethics*, 1(IE)

www.scu.edu/ethics/practicing/decision/wheatsethics.html

1. Client Communication. Prioritize roles, define roles and track email, conversations and notes. Keeping track of all correspondence shows your clients you are aware of the legalities of tracking communication.

2. Legal Resources. Websites, books and reference tools are a great way to quickly check ethics laws.

3. Accurate Billing. Use a task timer and charge clients accurately for your time. Track details of each task you are working on.

4. Court Rules. Know e-filing rules for your client's jurisdiction. E-filing rules vary by state. Know the rules for the particular court you are filing with.

5. Disclosures. When you blog, make sure you have "clearly and conspicuously" posted disclosure of any sponsor who provided you with goods or services. (Jack Shafer, Initials. (2009, October 7) *FTC's mad power grab*, <http://slate.comid/2231808>)

6. Client Access. Do not destroy copies of documents provided to you without express consent of the client. If you are going paperless, check ethical guidelines for rules on what you must keep.

Laura Alvarez is the owner of Off The Clock Legal VA. She received her bachelor degree in paralegal studies and has three years paralegal experience. Laura specializes in legal research.

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Your
Virtual Paralegal Success Team
wishes you much success in your
Virtual Paralegal Career!



Success doesn't come to you...
you go to it.

~ Marva Collins

What are you waiting for?

Sixty-Six Solid Tips from the

Virtual Paralegal Success Team

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