

Practical AI and Automation Tools for Maryland Legal Nonprofits

Partners for Justice Conference 2025

Russ Bloomquist

Maryland Legal Aid

Dave Pantzer

*Maryland Legal Services
Corp*

Lee Sampson

*Maryland State Law
Library*



Welcome!



[Heygen translation](#)



This presentation – the big picture

1. Introductions
2. First, a few commercial off-the-shelf tools that you can get started with right away.
 - A. ChatGPT Team Workspace (Dave)
 - B. Notebook LM (Lee)
 - C. Others (All)
3. Then, bigger AI and automation projects underway in Maryland.
 - A. mlaGPT (Russ)
 - B. Downloadable tools (Russ)
 - C. Offline options (Lee)
4. Finally, discussion of AI Use Policies and security, and Q/A. (All)

Audience Poll – how much do you use AI?

					
0 – Never	1 – A tiny bit	2 – Monthly	3 – Weekly	4 – Daily	5 – I am AI
I don't even know how you get to the web page!	I asked it where I should go out to eat while I'm at the conference.	Every now and then I have an idea that I try.	I've started to consider how it can help with everything.	I use AI tools routinely, and tell others how they can.	I could reprogram ChatGPT to give number 4 a thumb!

Question 2: Do you currently pay to use AI tools?

Commercial Off-the-Shelf Tools

- Overview of user-friendly tools legal nonprofits can adopt immediately:
- - ChatGPT Team Workspace
- - Notebook LM
- - Microsoft Copilot
- - Zoom
- - Everlaw for nonprofits



ChatGPT *Team Workspace* – What it is

- High end general chatbot
- Build your own specialized chatbots with specific instructions and data/knowledge files
- Share chatbots within your team (or more broadly)
- Does not use workspace data to train its models

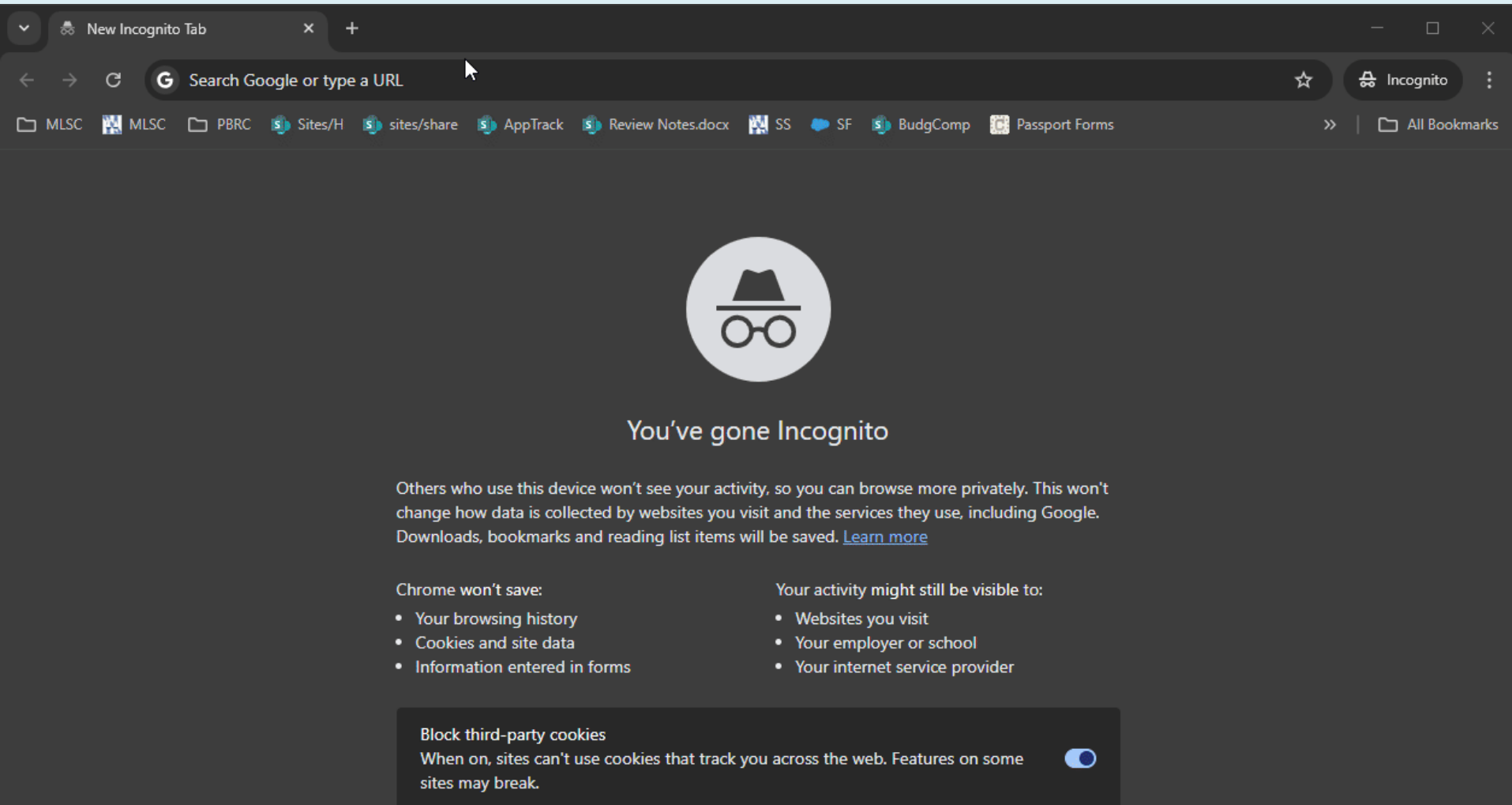
ChatGPT *Team Workspace* – Use Cases and Examples

1. Internal knowledge base

Upload resources (e.g., directories, policies, laws, guidance documents, etc.) and when you get a tricky question, ask it!

ChatGPT *Team Workspace* – Setting it up

1. Visit chat.openai.com



What can I help with?

Ask anything



Search



Deep research



Create image



info@mlsc.org



Add Teammates

Manage workspace

Tasks

My GPTs

Customize ChatGPT

Settings

Keyboard shortcuts

Help & FAQ

Release notes

Terms & policies

Get ChatGPT search extension

Log out

Create

Configure

Name

Name your GPT

Description

Add a short description about what this GPT does

Instructions

What does this GPT do? How does it behave? What should it avoid doing?

Conversations with your GPT can potentially include part or all of the instructions provided.

Conversation starters



Knowledge

Conversations with your GPT can potentially reveal part or all of the files uploaded.

Upload files

Capabilities

- ☒ Web Search
- ☒ Canvas
- ☒ 4o Image Generation
- ☐ Code Interpreter & Data Analysis ?

Allow this GPT to run code. When enabled, this GPT can analyze data, work with files you've uploaded, do math, and more.

Actions

Create new action

Preview

Ask anything



ChatGPT *Team Workspace* – Use Cases and Examples

2. Speedy or repeated analysis of formatted documents for specific question

Example: A chatbot to review organizational financial audits.

I will upload a PDF of a financial audit for a nonprofit. Please review each page of the audit and then provide a summary of information that I need to be aware of. Focus on any red flags or risks.

After doing this, please separately indicate, for the present year and the prior year, the following tests, placing them in a table: Current ratio; Quick ratio; Debt to Assets Ratio; General Administration-Fundraising Cost Ratio.

Please also calculate the change in net assets; and state the number of months of liquidity.



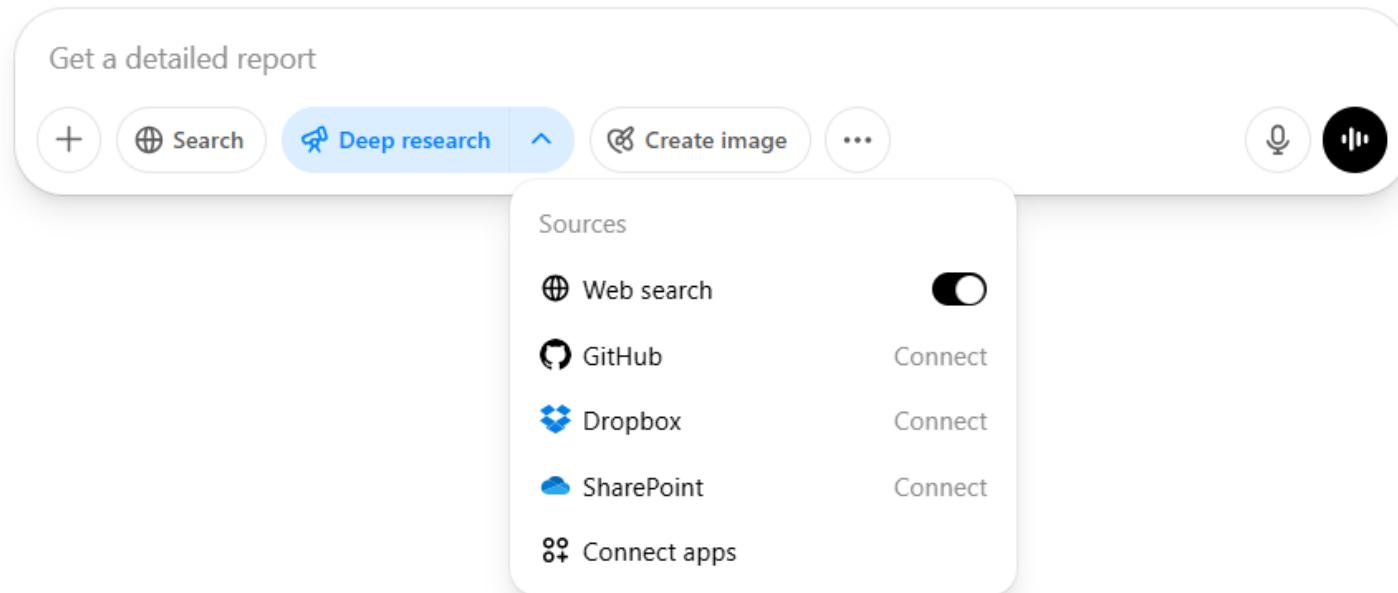
Financial Audit Review Tool

By Dave Pantzer

Ask anything



What are you researching?



April 24, 2025 update: We're significantly increasing how often you can use deep research —Plus, Team, Enterprise, and Edu users now get 25 queries per month, Pro users get 250, and Free users get 5. This is made possible through a new lightweight version of deep research powered by a version of o4-mini, designed to be more cost-efficient while preserving high quality. Once you reach your limit for the full version, your queries will automatically switch to the lightweight version.

ChatGPT ***Team Workspace*** – Natural Language Coding

Natural language coding – tell the computer in plain language what you want it to do

The GPT will prompt the user to upload the first report. The GPT will prompt the user to upload further reports, one by one, until the user replies, "done" instead of uploading a report.

The GPT will then prompt the user with this menu: "[N]-Narrative; [S]-Statistics; [F]-Final Summary; [A]-Ask me; [D]-Done" and await the corresponding response (Either N, S, F, A, or D). A

If the user enters N, the GPT will provide a brief summary of the narrative portions of the reports that were uploaded.

If the user enters S, the GPT will provide a brief summary of the statistical portions of the reports that were uploaded.

If the user enters F, the GPT will provide a very brief summary of the state of the program, based on the complete picture that emerges from all the uploaded reports.

If the user enters A, the GPT will say, "Ask your question..." and await the user's question. The GPT will then answer the question based on the relevant portions of the relevant reports. The GPT will then return to the main N, S, F, A, D prompt.

If the user enters D, the GPT will thank the user for their input and ask if they want the N, S, F, S, D menu back or if they are really done.

Sample Output

2. What challenges have the [GRANT PROGRAM] programs encountered this quarter?

Several recurring challenges were highlighted across the reports:

- **Attorney Recruitment Shortages:** [Grantee], [Grantee], and [Grantee] all pointed out difficulties in recruiting attorneys, particularly in rural or specialized areas. [Grantee] mentioned the need for attorneys with specific language skills, such as Amharic and Vietnamese, to serve growing immigrant populations. Similarly, [Grantee] struggled to place high-conflict cases due to limited attorney availability.
- **Attorney Burnout:** [Grantee] and [Grantee] expressed concerns about attorney burnout, especially as the same volunteers often handle multiple or more complex cases. [Grantee] reported similar issues, particularly in areas with fewer practicing family law attorneys.
- **Case Complexity:** [Grantee] and [Grantee] reported that cases are becoming more complex, leading to longer durations to close cases. This also ties into the challenge of attorney burnout, as volunteers are taking longer to resolve the cases they handle.

These challenges indicate a growing strain on resources, both in terms of attorney availability and their ability to manage increasingly complex caseloads.

ChatGPT *Team Workspace* – Building Data Visualization

Building Data Visualization

BZ	CA	CB		CC	CD	CE		CF	CG	CH		CI	CJ	CK		CL	CM	CN		CO	CP	CQ		CR	CS	CT		CU	CV	CW
78	79	80	81	82	83	84	85	86	87	88	89	90	91	92	93	94	95	96	97	98	99	100	101							
MLSC (Non-ML	All Brief Advice	MLSC (Non-ML	All Counseling	MLSC (Non-ML	All Negotiations	MLSC (Non-ML	All Document Preparation	MLSC (Non-ML	All Administrative Proceedings	MLSC (Non-ML	All Litigation	MLSC (Non-ML	All Other Remedies	MLSC (Non-ML	All Closed - Level															
90	77	167	0	0	0	0	0	0	0	0	0	193	126	319	11	18	29	0	0	0	294	221	515							
2	2	4	1045	266	1311	0	0	0	51	1	52	638	226	864	88	6	94	0	0	0	1824	501	2325							
111	137	248	30	15	45	0	0	0	2	0	2	0	0	0	32	14	46	0	0	0	175	166	341							
9	54	63	48	45	93	0	0	0	0	0	0	0	0	0	75	60	135	3	10	13	135	169	304							
16	42	58	0	0	0	0	0	0	0	0	0	0	0	0	28	50	78	0	0	0	44	92	136							
20	56	76	13	35	48	5	1	6	7	5	12	1	0	1	2	0	2	0	4	4	48	101	149							
1597	4904	6501	484	1860	2344	2	7	9	333	1009	1342	4	18	22	477	1856	2333	94	340	434	2991	9994	12985							
0	0	0	35	332	367	0	1	1	1	8	9	0	0	0	5	53	58	0	0	0	41	394	435							
882	606	1488	114	166	280	46	37	83	0	0	0	23	3	26	9	9	18	0	61	61	1074	882	1956							
243	7	250	179	8	187	1	0	1	26	0	26	0	0	0	147	5	152	5	1	6	601	21	622							
765	726	1491	148	142	290	0	0	0	49	47	96	0	0	0	44	43	87	0	0	0	1006	958	1964							
27	246	273	15	64	79	0	1	1	0	1	1	0	0	0	55	154	209	1	12	13	98	478	576							
7	29	36	29	124	153	7	31	38	0	1	1	15	65	80	106	449	555	0	0	0	164	699	863							
94	62	156	97	38	135	0	0	0	0	0	0	0	0	0	46	20	66	0	0	0	237	120	357							
176	46	222	1625	397	2022	0	0	0	0	0	0	0	0	0	321	120	441	0	29	29	2122	592	2714							
3	9	12	8	13	21	0	0	0	0	0	0	0	0	0	134	0	134	1	190	191	146	212	358							
51	470	521	5	38	43	0	0	0	0	3	3	6	6	12	22	72	94	2	11	13	86	600	686							
9057	296	9353	348	37	385	140	8	148	566	38	604	165	20	185	1214	842	2056	58	4	62	11548	1245	12793							
54	63	117	184	171	355	29	12	41	133	31	164	0	0	0	94	482	576	41	14	55	535	773	1308							
0	3	3	0	6	6	3	0	3	0	0	0	0	0	0	34	199	233	0	0	0	37	208	245							
453	52	505	916	97	1013	0	0	0	0	0	0	0	0	0	73	9	82	18	3	21	1460	161	1621							
0	863	863	0	686	686	0	2	2	0	391	391	0	14	14	0	1395	1395	0	0	0	0	3351	3351							
88	71	159	0	0	0	2	0	2	0	0	0	5	1	6	23	19	42	0	0	0	118	91	209							
5	41	46	12	100	112	0	1	1	0	6	6	0	20	20	17	85	102	0	0	0	34	253	287							
156	344	500	0	0	0	0	1	1	2	2	4	0	0	0	87	28	115	0	0	0	245	375	620							
100	125	225	426	520	946	4	4	8	97	118	215	0	1	1	18	21	39	40	48	88	685	837	1522							
14	193	207	0	0	0	10	141	151	0	0	0	0	0	0	19	258	277	73	1016	1089	116	1608	1724							
345	106	451	26	3	29	5	1	6	162	62	224	0	0	0	0	0	0	0	0	0	538	172	710							
70	3	73	14	2	16	0	0	0	0	0	0	6	13	19	3	4	7	0	0	0	93	22	115							
3	16	19	3	4	7	0	0	0	5	19	24	2	0	2	5	0	5	0	0	0	18	39	57							
0	0	0	13	96	109	2	20	22	40	477	517	5	13	18	0	0	0	0	0	0	60	606	666							
6061	1120	7181	0	5	5	0	1	1	0	0	0	21	84	105	33	268	301	0	0	0	6115	1478	7593							
0	0	0	38	177	215	0	0	0	0	0	0	53	115	168	0	0	0	0	0	0	91	292	383							

FY21

FY22

FY23

FY24

Name

Operating Grant Raw Data - askme

Description

Add a short description about what this GPT does

Instructions

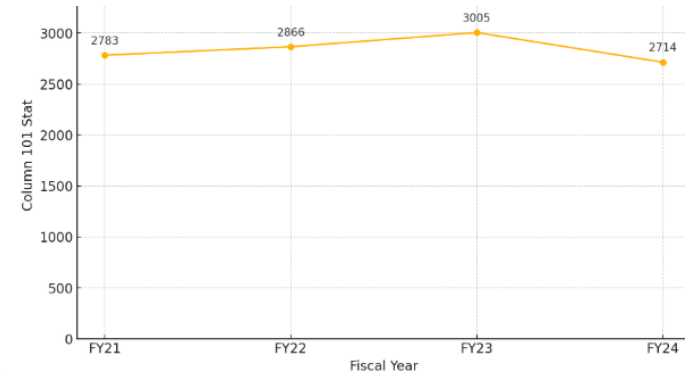
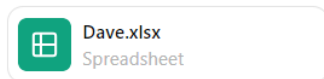
The knowledge file for this GPT is a multi-sheet spreadsheet representing the raw data for several grantees. We will ask the GPT questions about trends, based on the information. Most of the spreadsheet is for fiscal year (for example, FY24 means fiscal year 2024). The GPT will respond to questions. For example, we will ask about trends of how many cases of a certain kind that a certain grantee has done over time. In general, we will ask about column one on each tab, under the heading "Organization." The data points we will ask about are:

Conversation starters

Knowledge

If you upload files under Knowledge, conversations with your GPT may include file contents. Files are only available for Code Interpreter if it is enabled

The following files are only available for Code Interpreter:



- Please provide a line chart plotting the number of "All Closed - Level" cases for << X>>, across the four years labeled FY21, FY22, FY23, and FY24
- please plot the stat in column CW over time for grantee "<< X>>"
- please include data labels for the nodes on the graph, so I can see the exact numbers
- please plot column 101 over time for << X>>, including data labels on the graph
- please adjust the scale of the y-axis, so that it starts at 0
- please adjust the y-axis to go to 20% higher than the highest point
- now please add in another line, in another color, for the data points in column 95. please label this series "Litigation"
- Please rename the Column 101 Stat series to All Cases
- Now please add in a line called Brief Services, which is the sum of the data points in columns 80 and 83
- can you please make this graph for each grantee and output them all into a big word document?

Operating Grant Data – FY21 to FY24

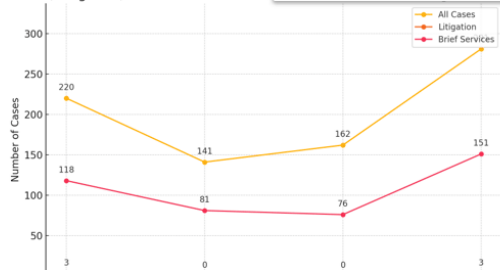
Grantee 1

Comparison of All Cases, Litigation, and Brief Services for [Redacted] (FY21-FY24)



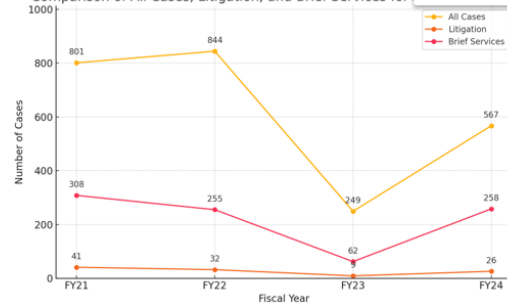
Grantee 2

Comparison of All Cases, Litigation, and Brief Services for [Redacted]



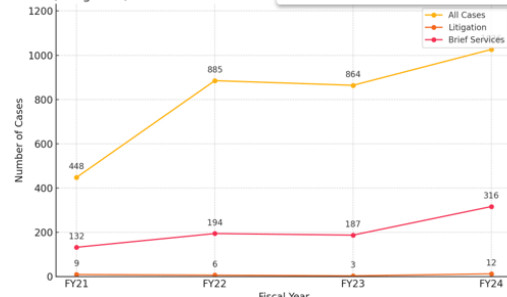
Grantee 3

Comparison of All Cases, Litigation, and Brief Services for [Redacted]



Grantee 4

Comparison of All Cases, Litigation, and Brief Services for [Redacted]



ChatGPT – Strategies

- Within its analysis, ask for citations to examples.
- Instead of relying on verbiage, ask it to identify themes.
- Build in visual verification aids, like numerical tags on graphs and charts.
- Use it as an assistant, to speed you up.
- It can produce output in MS Office format, not just text and images.
- Providing more context in your questions helps it produce more appropriate output.



NotebookLM

- Analysis and research
 - Summarize and query many large documents
 - Learn about a topic
 - Create outlines
 - Quickly check citations
-
- PDFs, websites, audio files, and Google docs



NotebookLM

- Not intended to draft content for the user

NotebookLM

 NotebookLM

 Set

Welcome to NotebookLM **Plus**


+ Create new



Most recent ▾


Title	Sources	Created	Role	
 Maryland District Court Appeal and Transcript Request	16 Sources	May 19, 2025	Owner	⋮
 INST 726 notebook	81 Sources	Feb 24, 2025	Owner	⋮


NotebookLM


 Plus


Maryland District Court Appeal and Transcript Request


Sources


 RULE 7-109.pdf


 RULE 7-113.pdf


 RULE 8-411.pdf


 Westlaw Edge - 8 full text items for Marylan...


 cantaffordappellatecosts.pdf


 cosaguideselfrepresentation.pdf


 dca027br.pdf


 dca119.pdf


 dccv037.pdf

 mdcourts.gov--Appeals to the Appellate Cou...


 mdcourts.gov-Information for Self-Repres...

 mdcourts.gov-Transcript Assistance Fund.pdf

 mdcourts.gov-Transcripts and Recordings.pdf

 rule 7-206.pdf


Chat





Maryland District Court Appeal and Transcript Request


16 sources


These documents outline the procedures and requirements for pursuing appeals in Maryland courts, including the District Court, Circuit Court, and the Appellate Court of Maryland, formerly the Court of Special Appeals. They detail the steps involved in filing a direct appeal or an application for leave to appeal, distinguishing between the two processes. Key aspects covered include filing deadlines, the content and transmission of the record on appeal (including transcripts and record extracts), payment and waiver of court costs and fees, and the potential for dismissal if rules are not followed. Information is also provided on access to confidential records and resources for self-represented litigants.

 Save to note




 Add note

 Audio Overview


 Mind Map

Start typing...

16 sources




How do Maryland District Court appeals and transcript requests generally proceed?




Studio

Audio Overview



Create an Audio Overview in more languages! [Learn more](#)



Deep Dive conversation


Two hosts


Customize


Generate


Notes


+ Add note

 Study guide

 Briefing doc

 FAQ

 Timeline

 Maryland Appellate Procedures and Costs

What are the initial costs associated with filing an appeal in Maryland? There are several costs involved in filing an appeal in...

NotebookLM can be inaccurate; please double check its responses.

Sources




+ Add

🔍 Discover

Select all sources



 RULE 1-325.pdf




 RULE 7-109.pdf




 RULE 7-113.pdf



 RULE 8-411.pdf



 Westlaw Edge - 8 full text items for Marylan...




 cantaffordappellatecosts.pdf



 cosaguideselfrepresentation.pdf



 dca027br.pdf



 dca119.pdf



 dccv037.pdf





Maryland District Court Appeal and Transcript Request

16 sources

These documents outline the procedures and requirements for pursuing appeals in Maryland courts, including the **District Court, Circuit Court, and the Appellate Court of Maryland**, formerly the Court of Special Appeals. They detail the **steps involved in filing a direct appeal or an application for leave to appeal**, distinguishing between the two processes. Key aspects covered include **filing deadlines, the content and transmission of the record on appeal (including transcripts and record extracts), payment and waiver of court costs and fees, and the potential for dismissal** if rules are not followed. Information is also provided on **access to confidential records and resources for self-represented litigants**.

 Save to note



Add note



Audio Overview



Mind Map

Start typing...

16 sources



How do Maryland District Court appeals and transcript requests generally proceed?



Configure Chat

Notebooks can be customized to work as a virtual research assistant, a personal tutor, a shared knowledge-base/help center, and more.

Define your conversational style

✓ Default

Analyst

Guide

Custom

Best for general purpose research and brainstorming tasks.

Choose your response length

✓ Default

Longer

Shorter



Maryland District Court Appeal and Transcript Request

16 sources

These documents outline the procedures and requirements for pursuing appeals in Maryland courts, including the **District Court, Circuit Court, and the Appellate Court of Maryland**, formerly the Court of Special Appeals. They detail the **steps involved in filing a direct appeal or an application for leave to appeal**, distinguishing between the two processes. Key aspects covered include **filing deadlines, the content and transmission of the record on appeal (including transcripts and record extracts), payment and waiver of court costs and fees, and the potential for dismissal** if rules are not followed. Information is also provided on **access to confidential records and resources for self-represented litigants**.

 Save to note



Add note



Audio Overview



Mind Map

Start typing...

16 sources

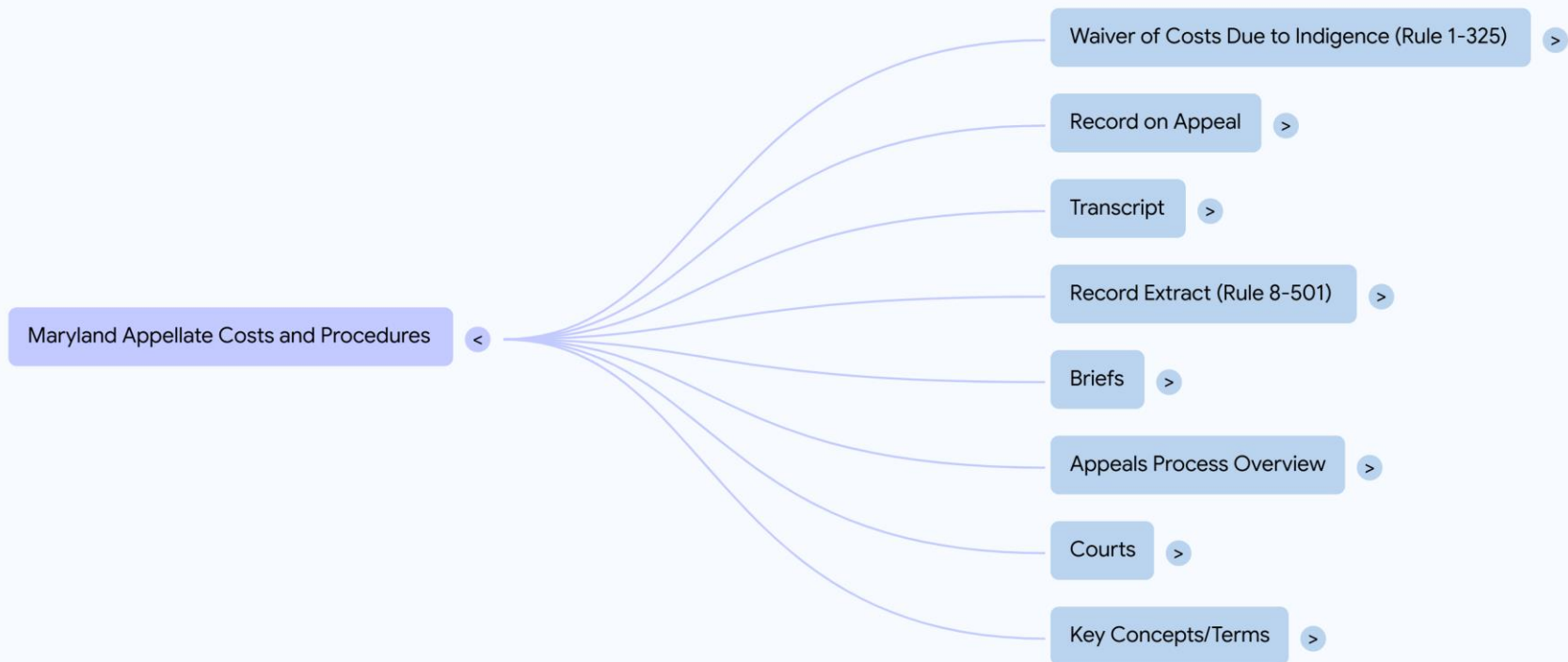


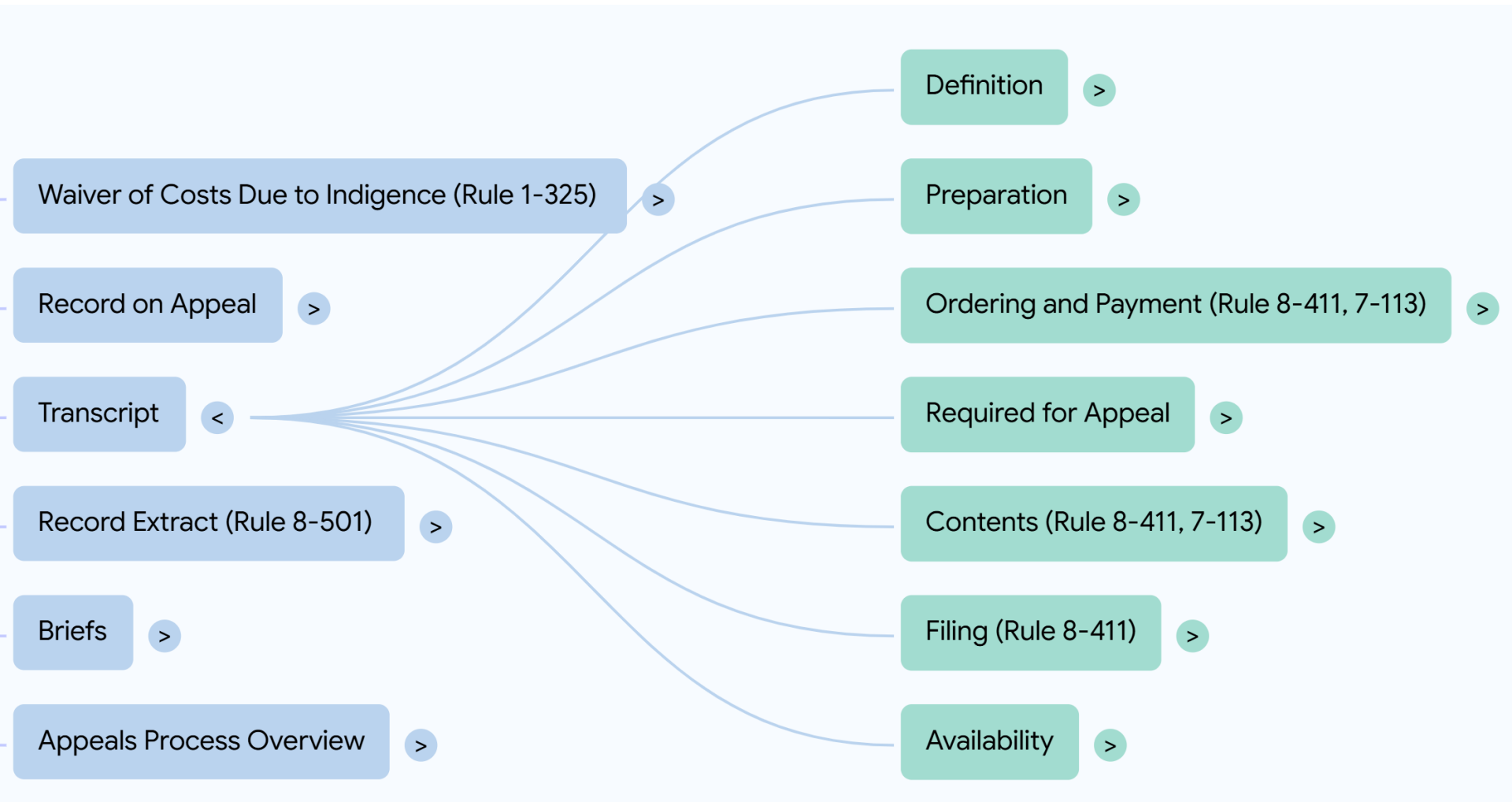
How do Maryland District Court appeals and transcript requests generally proceed?



Maryland Appellate Procedure Guide

Based on 16 sources





Discuss what these sources say about Preparation, in the larger context of Transcript.

Based on the sources provided, the concept of "Preparation" in the context of a Transcript in Maryland Appellate Costs and Procedures primarily refers to the process of creating the written document from the original recording of lower court proceedings, the associated costs, and the responsibilities for ensuring this preparation and its inclusion in the record.

Here's what the sources say about Transcript Preparation:

1. What is Prepared?

- A transcript is the **written version** of everything that was said during the trial or hearings in the lower court **1 ...**.
- Specifically, it involves the **transcription** of testimony **1 ...**, or that part of the testimony the parties agree is necessary **3 ...**.

1. What is Prepared?

- A transcript is the **written version** of everything that was said during the trial or hearings in the lower court 1

- Specifically, it involves the testimony the parties agree

- It also includes a **transcript** recorded 1

- For recordings made by video unless the appellate court can see a **complete and accurate** recording

A Civil Appeal Information Report is not required in criminal cases, juvenile causes, appeals from guardianships terminating parental rights, appeals from actions for a writ of error coram nobis, and

applications and appeals by prisoners seeking relief related to confinement or conditions of confinement.

Review Md. Rules 8-205 & 8-206.

cosaguideselfrepresentation.pdf



Source guide



Review Md. Rule 8-205(c) for the precise due date.

The Civil Appeal Information Report is filed with the Clerk of the Court of Special Appeals. If you are the appellant, be sure to complete the form and the Certificate of Service on the last page. Also, attach a copy of the Notice of Appeal and a copy of the written order or judgment of the circuit court.

Failure to file the Civil Appeal Information Report on time may result in the dismissal of the appeal.

Sometime after the filing of the Civil Appeal Information Report, the Court of Special Appeals will enter an order directing the case to proceed without a pre-hearing or scheduling conference or directing the parties to appear for a pre-hearing or scheduling conference. Most cases will proceed without a pre-hearing or scheduling conference.

A Civil Appeal Information Report is not required in criminal cases, juvenile causes, appeals from guardianships terminating parental rights, appeals from actions for a writ of error coram nobis, and

applications and appeals by prisoners seeking relief related to confinement or conditions of confinement.

Review Md. Rules 8-205 & 8-206.

4. Transcripts The appellant must timely order and pay for all

transcripts of the lower court proceedings that are relevant to the Court of Special Appeals' review of the case on appeal. A transcript is the written record of everything that was said in the lower court during the trial or hearing. Rule 8-411(a) specifies what transcripts are required.

cosaguideselfrepresentation.pdf

◆ Source guide

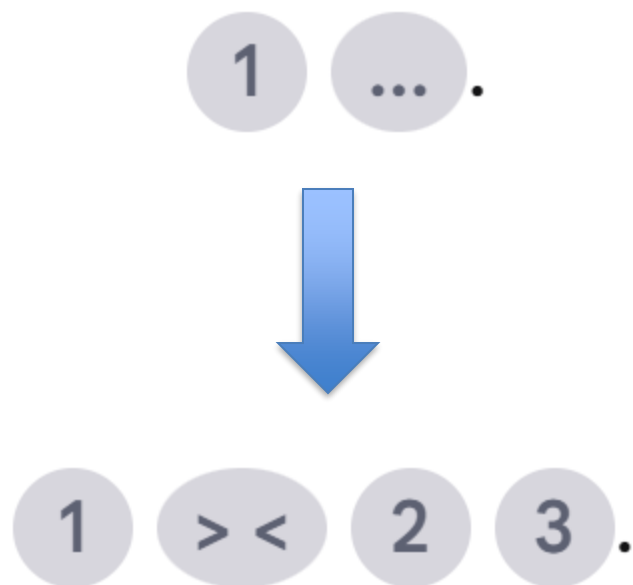
Summary

This guide from the Maryland Court of Special Appeals provides **essential information for non-lawyers navigating the appellate process in Maryland**. It clearly distinguishes between a **direct appeal** and an **application for leave to appeal**, explaining when each is required and the **strict deadlines and filing requirements** associated with both. The document outlines the **steps involved in pursuing an appeal**, from filing the initial notice or application to preparing necessary documents like the **record extract and briefs**, and understanding the court's decision and mandate. It also includes helpful resources such as a glossary, fee schedules, and sample forms to aid those representing themselves.

Key Topics

[Self-Representation G...](#)[Appellate Court Revi...](#)[Notice of App...](#)[Application for Le...](#)[Filing Requireme...](#)

NotebookLM



please distinguish the difference between preparation of transcripts when appealing from district court to circuit court, versus appealing from the circuit court to the appellate court

Based on the provided sources, there are notable differences in the preparation and handling of transcripts when appealing from the District Court to the Circuit Court compared to appealing from the Circuit Court to the Appellate Court (formerly the Court of Special Appeals) ¹

Here's a breakdown of the distinctions:

1. Appeals from District Court to Circuit Court:

- **When Required:** A transcript of the District Court proceeding is a required component of the record *only* for appeals in a civil action where the amount in controversy exceeds \$5,000 (or \$2,500 if the case was filed prior to October 1, 2003), *if* the appeal is heard on the record ⁵ Not all appeals from District Court to Circuit Court require a transcript; this requirement is specific to certain civil cases heard on the record above a monetary threshold ⁵

What I use it for

- New article drafting
 - Learning about and synthesizing a new topic quickly
 - Preparing an outline
- Searching for a citation
- Podcast feature is useful if topic is boring

Other uses

- Compare different positions on a topic
- Compare specific clauses or terms in multiple contracts
- Brainstorm questions for discovery, witnesses, etc.

Observations

- Lots of sources is important
- Statements can come from the wrong context
- Remembering a project
 - **ONLY USE PUBLIC DATA!!**

Cost

- Free to use
 - Up to 50 sources per notebook
 - 500,000 words or up to 200MB for uploaded files
 - Share a notebook
- \$20 per month
 - Up to 300 sources per notebook
 - Share notebooks
 - Sharing controls (for example share only the chat)

Microsoft Copilot

- Integrated into Office tools:
- - Summarize Word docs
- - Draft emails and content
- - Analyze Excel data
- - Automate Teams and Outlook tasks

CoPilot in Excel

	A	B	C	D	E	F	G	H
1	County	2020	2021	2022	2023			
2	Allegany	2027	1765	1997	2002			
3	Anne Arundel	26884	22902	22001	29476			
4	Baltimore City	33213	28859	36597	39336			
5	Baltimore County	18343	22589	29958	30627			
6	Calvert	1944	2235	2453	2286			
7	Caroline	1051	925	1047	882			
8	Carroll	2258	1797	2297	2160			
9	Cecil	2300	2270	2439	2146			
10	Charles	4462	4408	4814	6520			
11	Dorchester	1041	923	1400	1263			
12	Frederick	7196	6858	9238	10095			
13	Garrett	531	515	549	524			
14	Harford	5679	5712	6107	6135			
15	Howard	4524	5178	5914	5594			
16	Kent	353	379	455	407			
17	Montgomery	16953	18470	25747	27735			
18	Prince George's	35523	29501	40595	46354			
19	Queen Anne's	894	818	747	787			
20	St. Mary's	2604	2893	3125	2822			
21	Somerset	1944	658	840	788			
22	Talbot	1161	1000	1100	910			
23	Washington	3457	3114	4311	4932			
24	Wicomico	4575	3855	5595	5654			
25	Worcester	1178	1087	1446	1299			
26								

Copilot (Preview)

Create formulas
Suggest a formula column

Understand
Summarize using PivotTables or charts

Apply color and formatting
Highlight all cells with [incomplete in red]

can you make a projection of each county's number for 2024?

Here's 1 formula column to review and insert:

2024 Projection
Projects the value for 2024 by using a linear forecast based on the data from 2020 to 2023 for each county.

`=FORECAST.LINEAR(2024, [2020]:[2023], {2020, 2021, 2022, 2023})`

Show explanation

+ Insert column

AI-generated content may be incorrect

Copilot in Word

Summarize or
interrogate an
existing
document

The screenshot displays the Microsoft Word application window. The ribbon at the top includes tabs for File, Home, Insert, Draw, Design, Layout, References, Mailings, Review, View, Developer, Help, and Acrobat. The Home tab is active, showing options for Paste, Clipboard, Font (Aptos, size 11), Paragraph, Styles, Editing, Dictate, Sensitivity, Add-ins, Editor, and Copilot. The main document area contains text about 'Apps.mdlab.org' and a list of seven features: Court Forms Generator, Digital Signature Manager, Events and Venue Manager, ExpungeltMD, Walk-in Registration, MCLA App, and MLAGPT. On the right, the Copilot sidebar is open, featuring a chat interface with a welcome message, suggested actions like 'Summarize this doc' and 'Ask a question about this doc...', a chat history section, and a search bar at the bottom.

File Home Insert Draw Design Layout References Mailings Review View Developer Help Acrobat Editing

Paste Clipboard Font Paragraph Styles Editing Dictate Sensitivity Add-ins Editor Copilot

Apps.mdlab.org is a comprehensive platform offering a variety of features include:

1. **Court Forms Generator:** This app integrates case search number, select a court form, and the system merges the in
2. **Digital Signature Manager:** Allows users to send select co signatures via text or email.
3. **Events and Venue Manager:** Users can publish legal clinic
4. **ExpungeltMD:** This platform automates the expungement eligibility for record expungement. With just a client's name reviews eligibility criteria, generates the necessary legal for
5. **Walk-in Registration:** A management tool for walk-in regis
6. **MCLA App:** Designed for the Maryland Center for Legal Ass and communications with self-represented litigants. It incl module that generates multi-million-dollar invoices each q thousand of self-represented litigants annually and much r
7. **MLAGPT:** This generative AI tool can be used for a wide ran automation. The system can work with PDFs, Word docum process a variety of audio and video files. MLA has a zero-d our AI system HIPAA compliant.

Copilot

I can chat, respond to your questions, and help you with writing and summarizing this document.

Here are some things you can try

Summarize this doc

Ask a question about this doc...

Chat history

Summarize this doc Is there a call to action?

Ask me anything about this document

Page 1 of 1 243 words Text Predictions: On Accessibility: Good to go Focus 100%

Copilot in Word – editing “down”

Notes: MLSC will involve grantees in three phased groups.

- **Group 1:** 2-5 grantees – early adopters. These grantees will immediately test the first draft of the MLSC data template, to determine the extent to which they can immediately comply. This test and follow-up conversation determines the understandability and sufficiency of the template.
- **Group 2:** 5-8 grantees – broader cohort, representative of most grantee types, and willing to discuss. These grantees will review the template and discuss challenges they foresee. This conversation determines likely common challenges, and proposed basic frameworks for resolution.

Groups 1 and 2 will receive early access to technology grant funding (GA1) to facilitate resolutions to any reporting needs.

- **Group 3:** all remaining grantees.

All grantees will have access to technology grant finalized requirements.



Rewrite with Copilot

Visualize as a Table


Group	Number of Grantees	Description	Purpose	Grant Funding
Group 1	2-5	Early adopters	Test the first draft of the MLSC data template	GA1
Group 2	5-8	Broader cohort, representative of most grantee types	Review the template and discuss challenges	GA1
Group 3	All remaining grantees	All other grantees	Compliance with finalized requirements	GA2

Zoom

- Zoom AI Companion:
 - - Summarizes meetings
 - - Highlights key points and tasks
 - - Add-ons: Otter.ai, Notta for transcription and analysis

AI for better meetings

Zoom recording/transcribing/ translating features

 Products Solutions Resources Plans & Pricing

Profile

Meetings

Webinars

Personal Contacts

Personal Devices

Whiteboards

Notes **NEW**

Surveys

Recordings

> AI Companion

Clips **NEW**

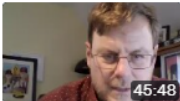

Scheduler

[Recordings](#) > Maryland Legal Services AI Workgroup


Maryland Legal Services AI Workgroup


May 8, 2024 03:01 PM Eastern Time (US and Canada) ID: 831 2542 4240


0 total views • 0 total downloads [Recording Analytics](#)


 **Recording 1** 

4 Files 467 MB

 Download





 Copy shareable link

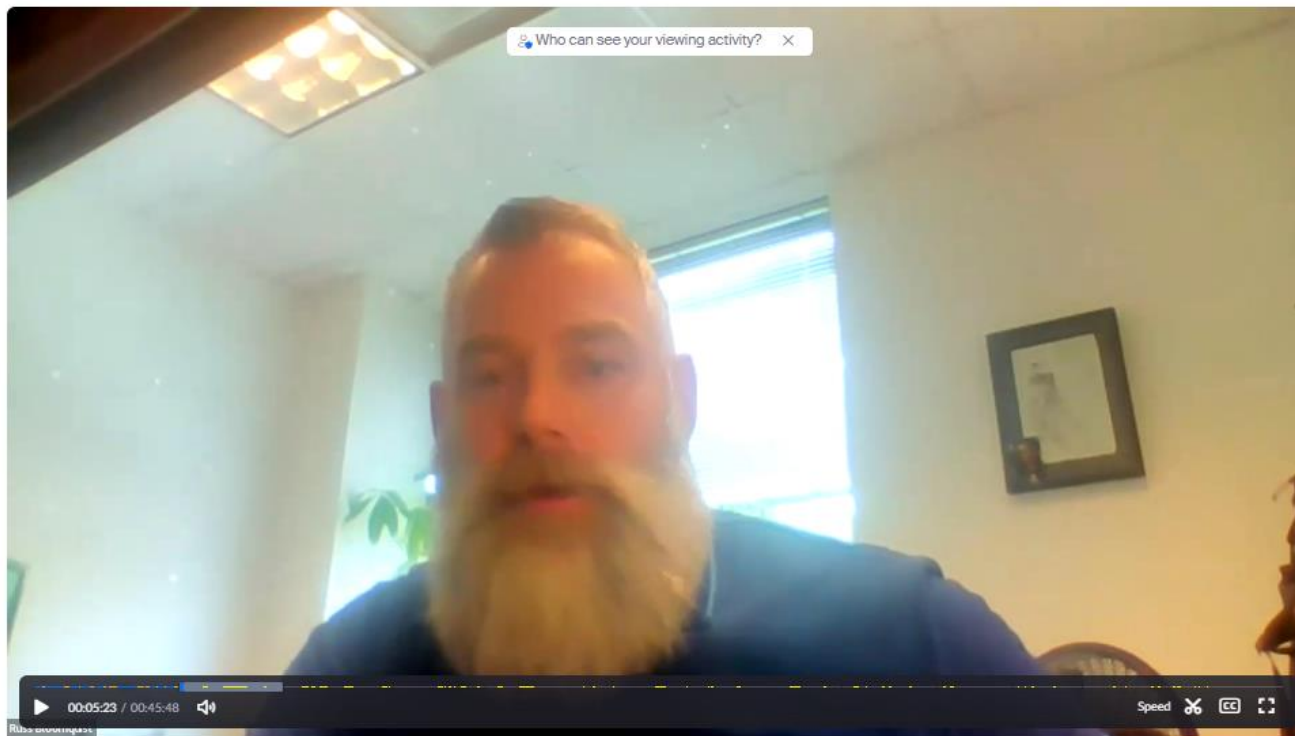
 Add to Zoom Clips

 Delete

Watch Highlights

The recording includes the files listed below:

-  Shared screen with speaker view
-  Audio only
-  Audio transcript - English(original)
-  Chat file



Only play highlights

Summary and smart chapters

My meeting coach

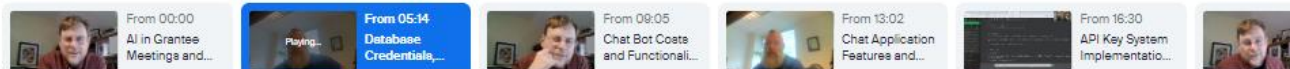
NEW Meeting coach

Get insights about your speech in a meeting. Only you and the admin can view your meeting coach metrics. [Learn more](#)

Summary

The team discussed the use of AI in recording and summarizing grantee meetings, the implementation of an API for OpenAI's text generator at Legal Aid, and the development of a chat bot for various purposes. They also explored the potential of combining various AI APIs, the use of AI for tasks such as rewriting letters and simplifying panel descriptions, and the challenges and potential solutions related to understanding and utilizing APIs. Lastly, they touched on topics related to voice technology, the weaponization of technology, and the use of Unreal Engine for creating AI and ... [View All](#)

Smart Chapters

**Database Credentials, Single Sign-On, Chat GPT API**

Russ and Dave discussed the current database of credentials and the potential implementation of single sign-on in the future. They also talked about the use of the API for Chat GPT, which doesn't save any data for training and only holds user interaction data for 30 days. Russ mentioned that a 0 data retention policy is expected to be launched in June. Dave raised concerns about users potentially sharing confidential information, to which Russ responded that they have a prompt helper section in Chat GPT that advises against this. They concluded that while there's some concern, the current policy seems to be adequate for their use case.

Audio Transcript

Chat Messages

Search transcript

got it caged so that the the Si that the Lim. Can't learn from the prompts.

Russ Bloomquist 06:06

It cannot.

So yeah, using the Api for for Chat Gpt, it doesn't save any of your data for training, and it only according to their terms of use. It only saves their data on their server for a very short time, like 30 days.

Oh.

Dave Pantzer, MLSC 06:22

What, what does it save for 30 days.

Russ Bloomquist 06:24

Just anything that you're interacting with it for saved on their servers for 30 days, like the things that's generating and the inputs. But I believe in June, they're launching a 0 data retention policy with 5. So I think, starting in June, it will have a 0 data retention policy. So none of our data will be saved there at all.

[Resume autoscrolling](#)

Next Steps

1. Russ will share the link to the base version of the Chatbot he created for the team to explore and use as a starting point for their own projects.
2. Matthew will consider developing a publicly consumable version of the instructions he gave to his law students for their AI projects, to share with other teams and organizations.

Everlaw for Nonprofits

- Advanced document review:
- - Free for legal nonprofits
- - GenAI clustering, summarization
- - Helps in large evidence sets and multilingual docs

Maryland Legal Aid's custom AI: mlaGPT

CHAT COMPLETION

Drafting/Editing Content
Idea Generation & Brainstorming
Summarization/Transformation

TRANSCRIPTION

Meeting & Client Notes
Content Creation via Audio/Video

ATTACHMENTS

Document Summarization
Document Analysis
Data Extraction & Transformation

R.A.G.

Enterprise Knowledge Base Tools
Resource and Referral Matching
Domain-Specific Legal Chat Bots

INTEGRATIONS

LegalServer
Power Automate/Teams
Outlook Rules/Email

MLAGPT – Retrieval-Augmented Generation Chatbots

- Fetches trusted source content
- Answers legal info questions
- Used in Bankruptcy Bot, Referral Bot

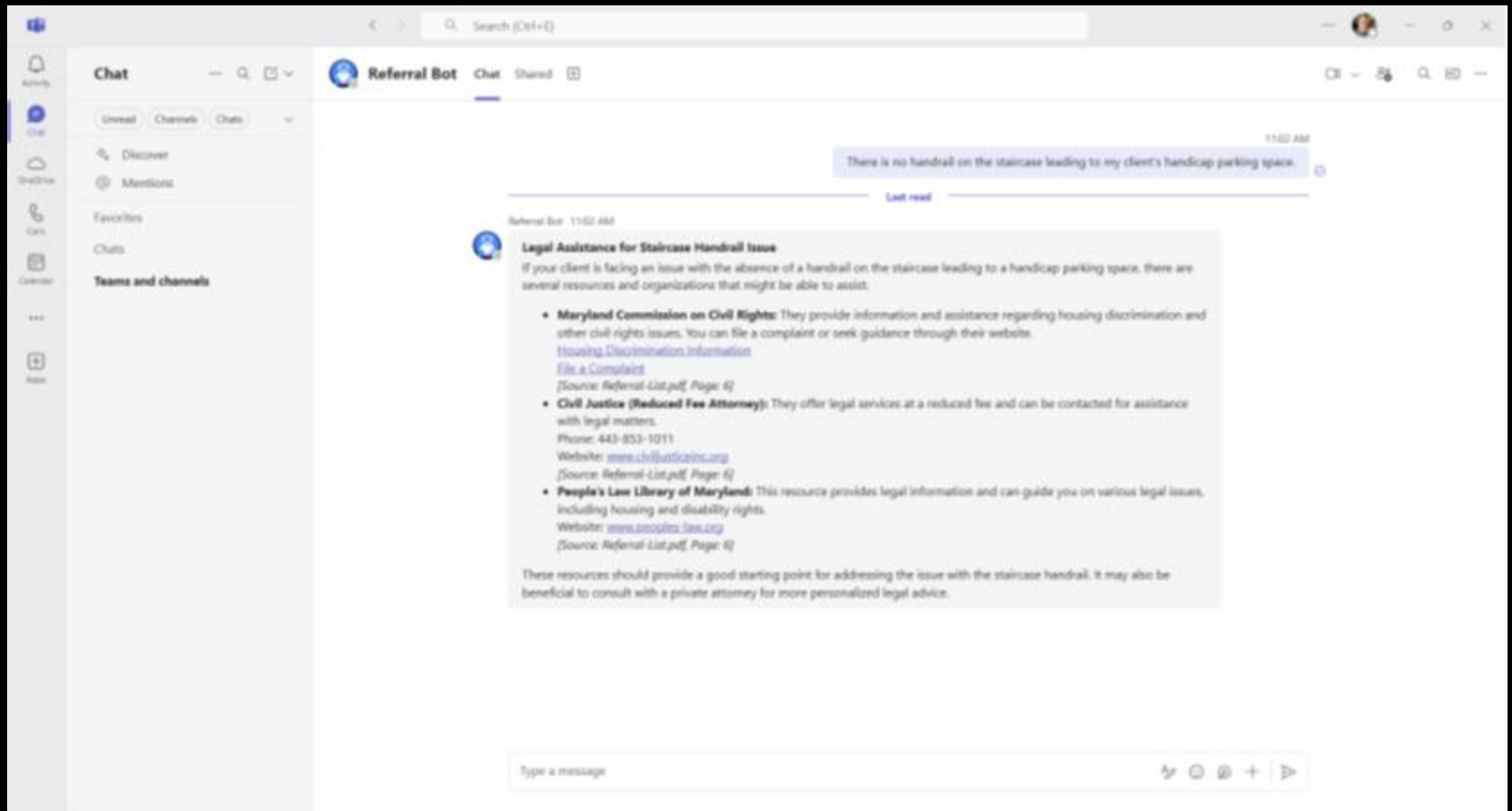
The screenshot displays the mlaGPT V3 web interface. On the left is a dark sidebar with a logo at the top, followed by a 'New Chat' button. Below are menu items: 'Chat Bots', 'mlaGPT Presets', 'Chat History' (with a dropdown arrow), 'App Launcher' (with a dropdown arrow), 'mlaGPT Training', 'Glossary', and 'Generative AI Policy'. At the bottom of the sidebar is a red 'Logout' button and copyright information: '© 2025 Maryland Legal Aid. Session Updated: - 0'.

The main content area has a dark header with the text 'Welcome to mlaGPT V3, Russ!' and 'How can I assist you today?'. Below this is a yellow informational box explaining Retrieval-Augmented Generation (RAG) and its limitations, with a link to 'mlaGPT'. Underneath is a blue bar containing a bot selector showing 'MCLA KB Bot' and a note to 'Use the dropdown to switch between bots.'.

A white text input field contains the query: 'how to find someone that has been arrested'. A blue 'Submit' button is located to the right of the input field.

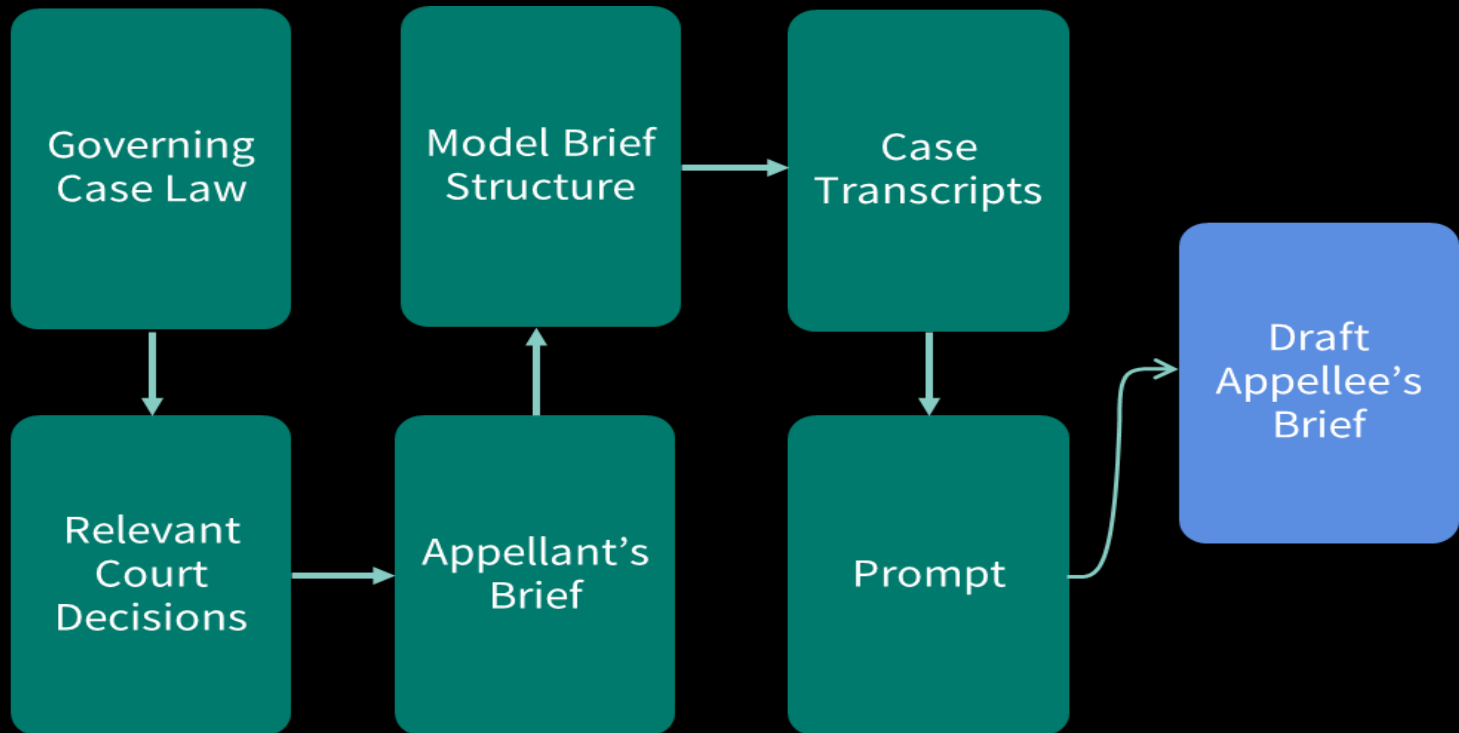
The response area, titled 'MCLA KB Bot Says:', contains the following text: 'To locate an incarcerated individual, you can use the following resources:'. It then lists '1. VINE (formerly Vinelink):' followed by a sub-point 'o Step 1: Visit VINE's Maryland page'.

MLAGPT – RAG Chatbots in TEAMS



MLAGPT – Brief Generator

- Input facts and legal issue
- Get first draft with structure
- Lawyer reviews and edits



MLAGPT – AI Transcription

- Voice-to-text conversion:
- Voicemails, interviews, hearings
- Searchable text
- Summarize key points with ChatGPT

The screenshot displays the mlaGPT V3 web interface. On the left is a dark sidebar with a logo at the top, followed by a '+ New Chat' button, a 'Chat Bots' button, and a list of links: 'mlaGPT Presets', 'Chat History' (with a blue circle icon), 'App Launcher', 'mlaGPT Training', 'Glossary', and 'Generative AI Policy'. At the bottom of the sidebar is a red 'Logout' button. The main content area has a dark background. At the top, it says 'Welcome to mlaGPT V3, Russ!' followed by 'How can I assist you today?'. Below this is the 'Upload Audio File' section, which includes instructions: 'Click "Choose File" below and select an audio file to be uploaded. You can also drag a single file into the file uploader as well. Upload should start automatically once a file has been selected.' It then prompts the user to 'Choose audio file (.mp3, .mp4, .m4a, .wav, .ogg):'. There is a file selection box with a 'Choose File' button and the text 'No file chosen'. To the right of this box is a large green 'Upload' button. Below the upload button, it says 'Contact IT if you need additional file type uploads.' At the bottom of the main area, there is a blue 'Board Meeting Minutes' button, a status bar showing 'Available Memory: 100%', and a search bar with a 'Presets' dropdown, a microphone icon, the text 'How can I help you today?', and a green submit button with a paper plane icon. A small disclaimer at the very bottom reads: 'While mlaGPT aims for accuracy, users are responsible for fact-checking generated content.'

Welcome to mlaGPT V3, Russ!

How can I assist you today?

Upload Audio File

Click "Choose File" below and select an audio file to be uploaded. You can also drag a single file into the file uploader as well. Upload should start automatically once a file has been selected.

Choose audio file (.mp3, .mp4, .m4a, .wav, .ogg):

Choose File No file chosen

Upload

Contact IT if you need additional file type uploads.

Board Meeting Minutes

Available Memory: 100%

Presets How can I help you today?

While mlaGPT aims for accuracy, users are responsible for fact-checking generated content.

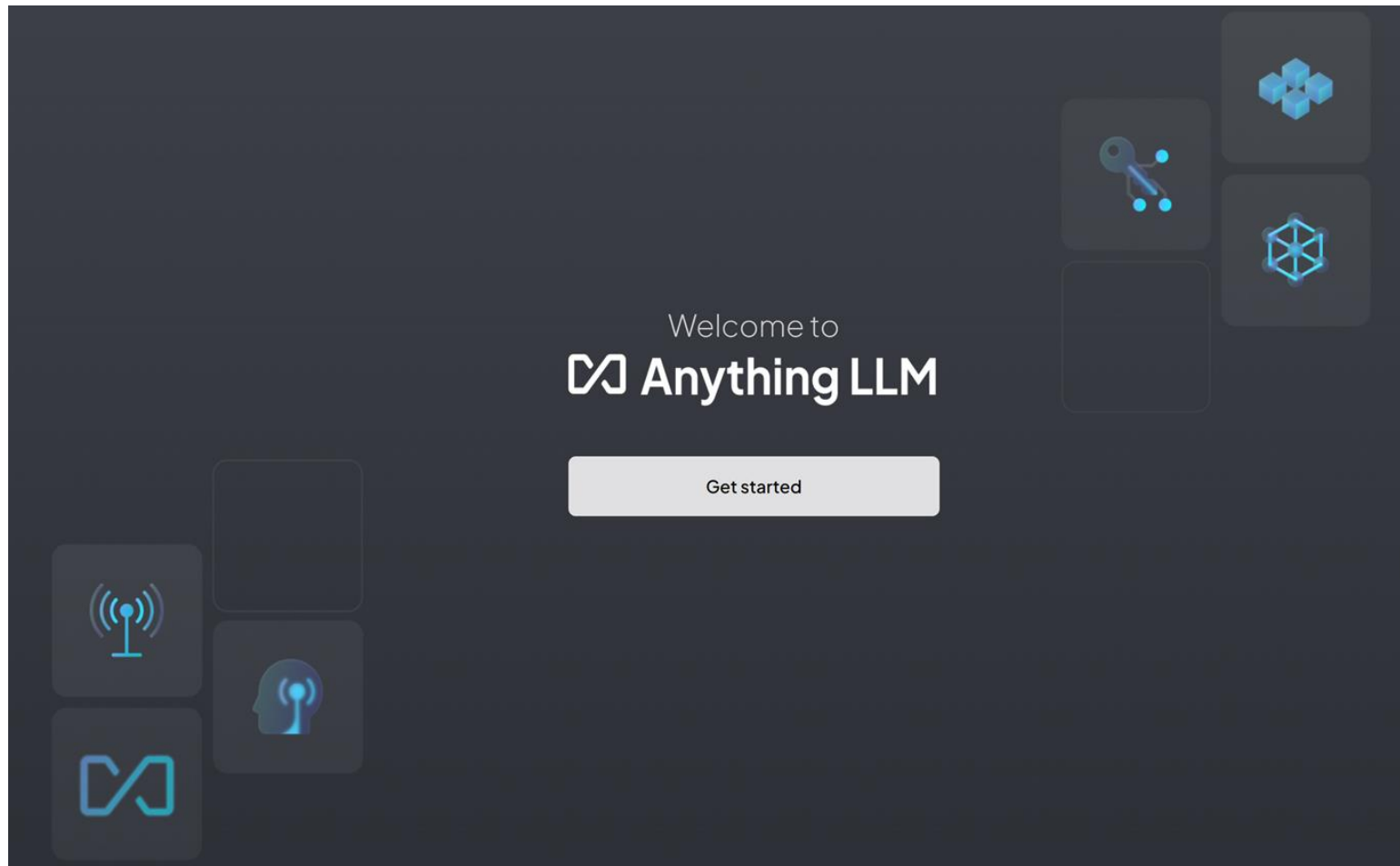
Downloadable AI Tools

- Offline-friendly models:
- - GPT4All, Llama 2
- - Run locally with no data sharing
- - Great for privacy-focused orgs

Offline AI Options

- No-internet-required tools:
- - AI kiosks or court support tools
- - Data privacy for sensitive work
- - Works in secure or remote areas

Anything LLM



Anything LLM

LLM Preference

AnythingLLM can work with many LLM providers. This will be the service which handles chatting.



Azure OpenAI

The enterprise option of OpenAI hosted on Azure services.



Anthropic

A friendly AI Assistant hosted by Anthropic.



Gemini

Google's largest and most capable AI model



HuggingFace

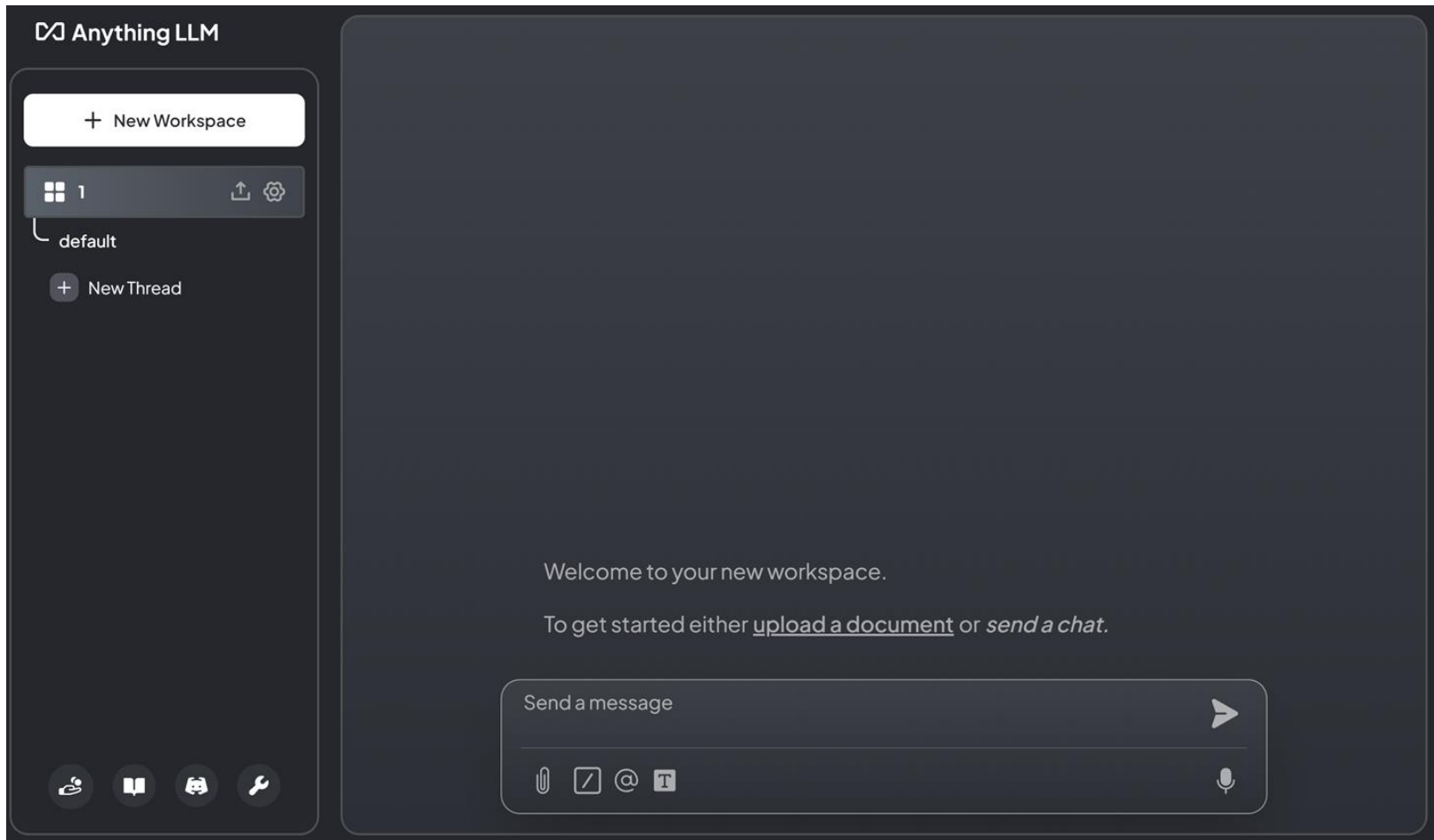
Access 150,000+ open-source LLMs and the world's AI community



Ollama

Run LLMs locally on your own machine.

Anything LLM



Anything LLM



aba-formal-opinion...
File embedded!

what is this document about?



Anything LLM



what is this document about?



This document appears to be a formal opinion (Formal Opinion 512) from an American Bar Association (ABA) committee regarding the use of self-learning artificial intelligence (GAI) tools by lawyers. The opinion discusses the potential risks and ethical considerations related to using these tools, particularly with regards to client confidentiality and the protection of sensitive information.



Hide Citations ▾



aba-formal-opinion...512.pdf

Anything LLM

aba-formal-opinion-512.pdf



Referenced 4 times.

26

MODEL RULES R. 1.6; MODEL RULES R. 1.6 cmt. [3].

27

MODEL RULES R. 1.6(c).

28

ABA Formal Op. 477R, *supra* note 6, at 1 (A lawyer “may be required to take special security precautions to protect against the inadvertent or unauthorized disclosure of client information when ... the nature of the information requires a higher degree of security.”).

29

① 42% match



Anything LLM

Prompt

The prompt that will be used on this workspace. Define the context and instructions for the AI to generate a response. You should to provide a carefully crafted prompt so the AI can generate a relevant and accurate response.

Given the following conversation, relevant context, and a follow up question, reply with an answer to the current question the user is asking. Return only your response to the question given the above information following the users instructions as needed.

Anything LLM

LLM Temperature

This setting controls how "creative" your LLM responses will be. The higher the number the more creative. For some models this can lead to incoherent responses when set too high.

Most LLMs have various acceptable ranges of valid values. Consult your LLM provider for that information.

0.7

AI Use Policies and Security

Policy essentials:

- Confidentiality and supervision
- Approved tools list
- Accuracy review process
- Transparency and training

OpenAI BAA and ZDR

To obtain a Business Associate Agreement (BAA) with OpenAI for API services, follow these steps:

1

PREPARE YOUR INFORMATION:

Gather details about your company and the specific use case for which you require the BAA. **(Must include medical-related use case.)**

2

CONTACT OPENAI

Send an email to baa@openai.com, including information about your company and use case.

3

AWAIT RESPONSE:

OpenAI's team typically responds within 1-2 business days. They may request additional information to assess your request.

4

REVIEW AND SIGN:

If your request is approved, you'll receive the BAA for review and signature.

OpenAI BAA and ZDR

ZERO RETENTION ENDPOINTS

Only API endpoints eligible for zero data retention are covered under the BAA.

Ensure your use case aligns with these endpoints.

Zero data retention

Zero data retention will be applied to every **eligible request** made by this organization within 24 hours of activation.

 Active

<https://platform.openai.com/settings/organization/data-controls/data-retention>

ENDPOINT	DATA USED FOR TRAINING	DEFAULT RETENTION	ELIGIBLE FOR ZERO RETENTION
/v1/chat/completions*	No	30 days	Yes, with restrictions*
/v1/responses**	No	30 days	Yes, with restrictions*
/v1/audio/transcriptions	No	Zero data retention	-
/v1/embeddings	No	30 days	Yes

* Yes: Except (a) image/file inputs, (b) schemas provided for Structured Outputs, or (c) audio outputs.

MSBA Ethical Use Considerations

- Overview of Ethical Considerations for Attorney Use of Generative Artificial Intelligence Technologies
- Competence + Diligence
- Supervision + Responsibilities
- Confidentiality + GAI Risks
- Scope of Representation, Communication, + Fees
- Advertising + GAI-Generated Content
- Candor, Misrepresentation, + GAI

MSBA Ethical Use Considerations

Competence & Diligence

- Approach legal research with GenAI with caution
- Check the citations carefully
- Especially check other people's citations

MSBA Ethical Use Considerations

- [The Impact of Generative AI on Critical Thinking: Self-Reported Reductions in Cognitive Effort and Confidence Effects From a Survey of Knowledge Workers](#)
- "higher confidence in GenAI is associated with less critical thinking, while higher self-confidence is associated with more critical thinking."

MSBA Ethical Use Considerations

Supervision & Responsibilities

- Have a GenAI policy
- Talk about it, train staff about it, enforce it
- Update when needed – you'll encounter new situations at first that you didn't think about

MSBA Ethical Use Considerations

- Sanctions imposed for 'collective debacle' involving AI hallucinations and 2 firms, including K&L Gates
- 9 out of 27 citations in a 10 page brief were inaccurate in some way
 - 2 of the cases did not exist

MSBA Ethical Use Considerations

- Plaintiff was represented by 2 firms, Ellis George (EG) and K&L Gates
- Lawyer at EG "used various AI tools to generate an 'outline' for the supplemental brief."
- Outline sent to K&L
- "They incorporated the material into the brief. No attorney or staff member at either firm apparently cite-checked or otherwise reviewed that research before filing the brief with the Special Master."

MD Judiciary AI Policy

- Use approved platforms
- Don't input confidential data
- Verify output
- Be aware of bias

Generative AI & Legal Research: A Mismatch?

- [Article published in American Association of Law Libraries *Spectrum* magazine](#)
- **How GAI Works:** LLMs, the basis of GAI, are "word prediction machines" trained on vast data.
- **LLM Limitations:** General LLMs lack depth for nuanced legal questions.
- **Improving Reliability:** Methods include fine-tuning and Retrieval Augmented Generation (RAG).
- **Type 1 vs. Type 2 Thinking:** GAI excels at Type 1 (instinctual) but struggles with Type 2 (analytical) thinking.
- **Optimal GAI Uses:** Great for topic overviews, research step suggestions, and confirming lack of sources.

Conclusion and Next Steps

Takeaways:

- AI is a powerful helper
- Start small with clear rules
- Share what works
- Train staff and iterate
- Let values and collaboration lead innovation

Nonprofit Use Policies

- What to include:
 - - Responsible Use
 - - Training commitment
 - - Data Classification
 - - Approved Tools
- - Who can use what tools
- - Confidentiality limits
- - Supervision and training
- - Updates as tech evolves