



# LEVERAGING EFFICIENCIES & AUTOMATING WITH AI

ETHICAL | SCALABLE | AFFORDABLE



# AGENDA

INTRODUCTION & CONTEXT

INNOVATION WITH INTEGRITY

CORE FUNCTIONALITY

COLLABORATION & INNOVATION

ENGAGING WITH STAFF

REAL-WORLD USE CASES

ENSURING ETHICAL USE

WHAT'S NEXT?

# ABOUT MARYLAND LEGAL AID

Maryland Legal Aid is a statewide nonprofit law firm that provides free, civil legal services to low-income and vulnerable people to address their most fundamental legal needs.

**12 Office locations | 11 Help Centers**

**390+ Employees\* Statewide**

\*Includes the Maryland Center for Legal Assistance (MCLA) a wholly owned subsidiary of Maryland Legal Aid.



## WHY BUILD?

Building an in-house solution ensures an ethical, scalable, and affordable approach that empowers MLA with custom workflows, cost efficiency, and full control over data, privacy, and technology.

- Custom solution aligned with workflows
- Chat completions: Achieved a cost of ~\$1.10 per user
- Full control over UI/UX, permissions, and features
- Integrated with existing tools like Office 365 and LegalServer



# INNOVATION WITH INTEGRITY

## COMMITMENT

Proactively explore and incorporate tools that improve efficiency and expand access to justice.

## TRAINING

Mandatory prerecorded training required prior to application use.

## POLICY

Establish clear guidelines for responsible, ethical, and mission-aligned use of AI.

## TRANSPARENCY

Share openly how AI is used and designate oversight to ensure responsible use.

## PRIVACY

Uphold the highest standards of data security and confidentiality in every implementation or project.

## REVIEW

Regular evaluation for effectiveness, security, and mission alignment.

# MLAGPT: CORE FUNCTIONALITY

## CONVERSATIONS

Writing/Editing, Idea Generation and Brainstorming, Summaries and Rewriting.

## EMBEDDINGS

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

## TRANSCRIPTIONS

Meeting and Client Notes Content Creation via Audio/Video.

## INTEGRATIONS

LegalServer.  
Power Automate/Teams.  
Outlook Rules/Email.

## ATTACHMENTS

Document Summarization and Analysis Data Extraction /Transformation.

# COLLABORATION + INNOVATION

# ENGAGING WITH STAFF

- **Innovation Meetings** – Ongoing sessions for staff to share ideas, challenges, and new AI use cases.
- **Office Hours** – Drop-in sessions for real-time troubleshooting and guidance.
- **1:1 Sessions** – On-demand, personalized 30-minute support sessions tailored to individual needs.
- **In-App Feedback** – Built-in channels for staff to share input directly within the tools they use.





# ROBERT BOEHLERT, ESQ. HOUSING LEDGER DOCUMENT ANALYSIS



The screenshot shows the mlaGPT V3 interface. On the left is a dark sidebar menu with options: + New Chat, Chat Bots, mlaGPT Presets, Chat History, App Launcher, mlaGPT Training, Glossary, Generative AI Policy, and Logout. The main area displays a welcome message: "Welcome to mlaGPT V3, Russ! How can I assist you today?". Below this is a "What's New in mlaGPT V3" section with a bulleted list of updates: 

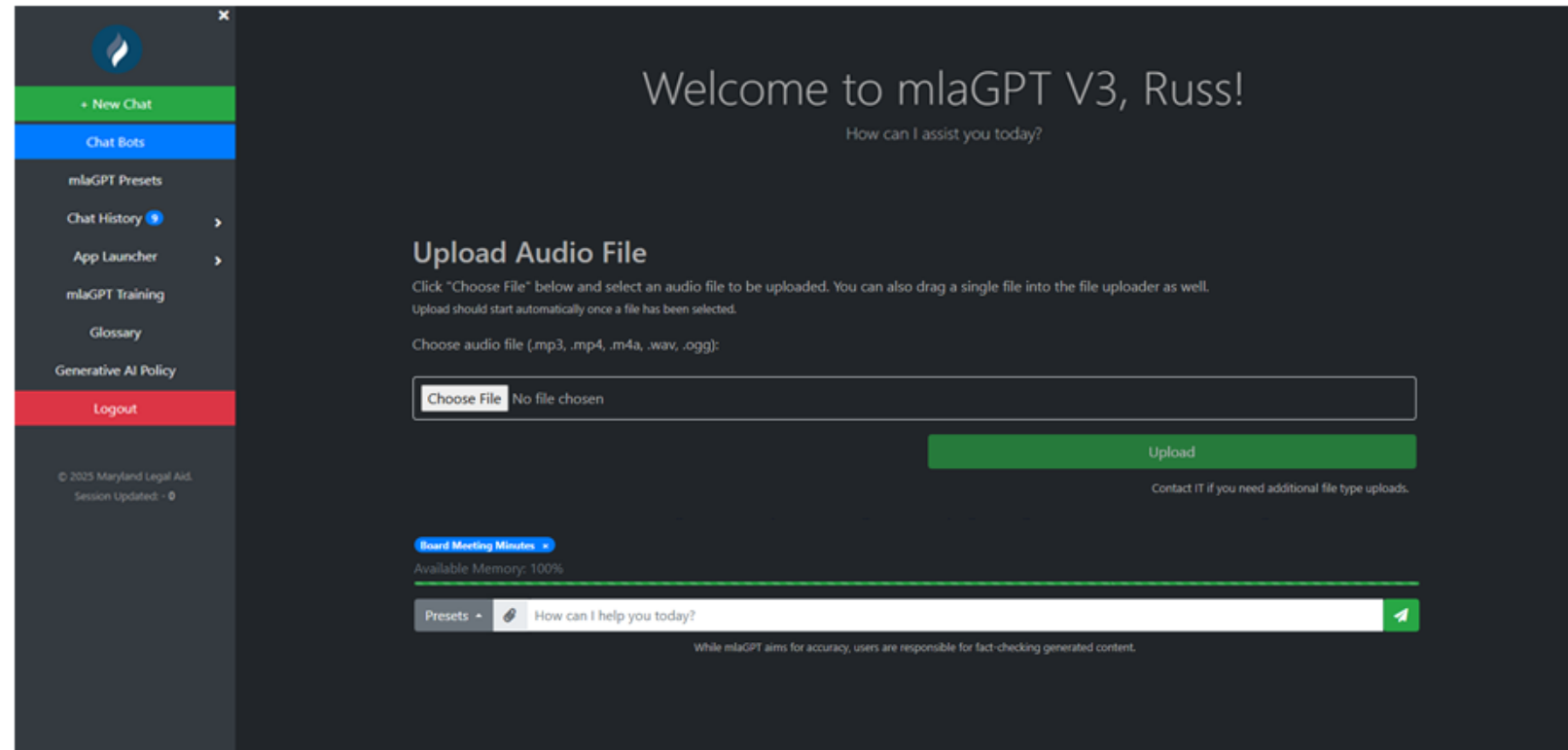
- PII Compliance:** mlaGPT now allows the secure processing of Personally Identifiable Information (PII) under a Zero Data Retention (ZDR) agreement, ensuring our AI service provider is in full compliance with privacy standards for sensitive data.
- Extended Context Lengths:** mlaGPT has a 30X (96%) increase in context length, allowing for substantially more comprehensive output.
- Memory Visualizer:** An available memory visualizer has been added, enabling users to monitor memory usage.
- Reusable Preset Prompts:** Users can now create and save preset prompts for repeated use, streamlining workflows.
- Improved Output Formatting:** The output format has been refined to enhance readability and usability with office applications.
- Basic URL Data Scraping (Beta):** Beta functionality that allows users to pull text from web pages via URLs. Disclaimer: Data scraping may have intermittent success and is not permitted on all websites. Use responsibly.
- YouTube Data Scraping (Beta):** Easily gather metadata/transcripts from YouTube links to support research and analysis.

Below this is a "Prohibited" section with a bulleted list: 

- PHI:** Please note that Protected Health Information (PHI) is NOT allowed at this time.
- Code Generation:** Code generation, the process of using AI to create programming code (e.g., PHP, Python, JavaScript, etc.), is not supported and is strictly prohibited.

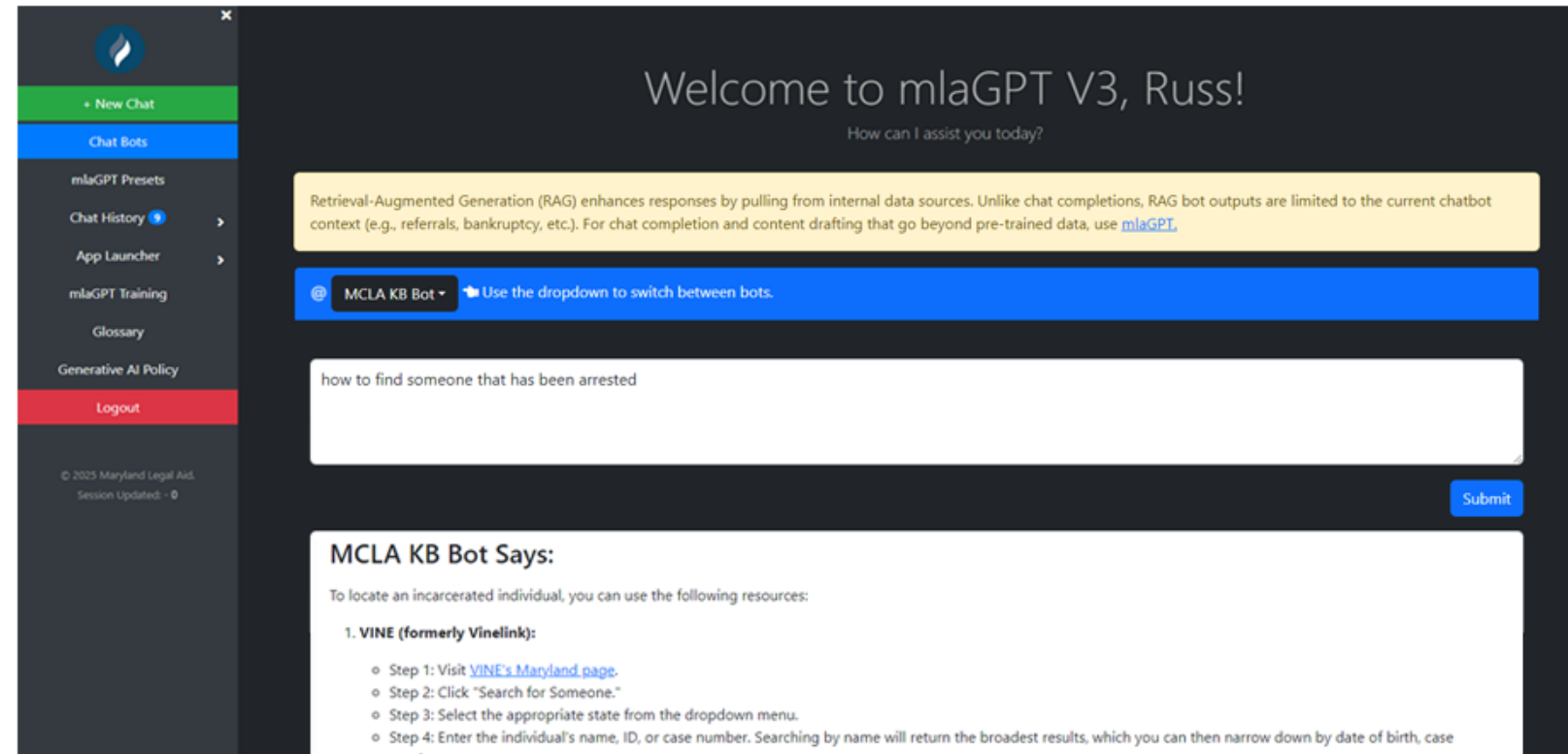
At the bottom of the interface, there are tabs for "Housing Ledger Review" and "Ledger.pdf", a memory indicator showing "Available Memory: 98%", a search bar with the text "How can I help you today?", and a green send button. A footer note states: "While mlaGPT aims for accuracy, users are responsible for fact-checking generated content."

# CHERRELLE HOLLEY-GOODMAN AUDIO/VIDEO TRANSCRIPTIONS



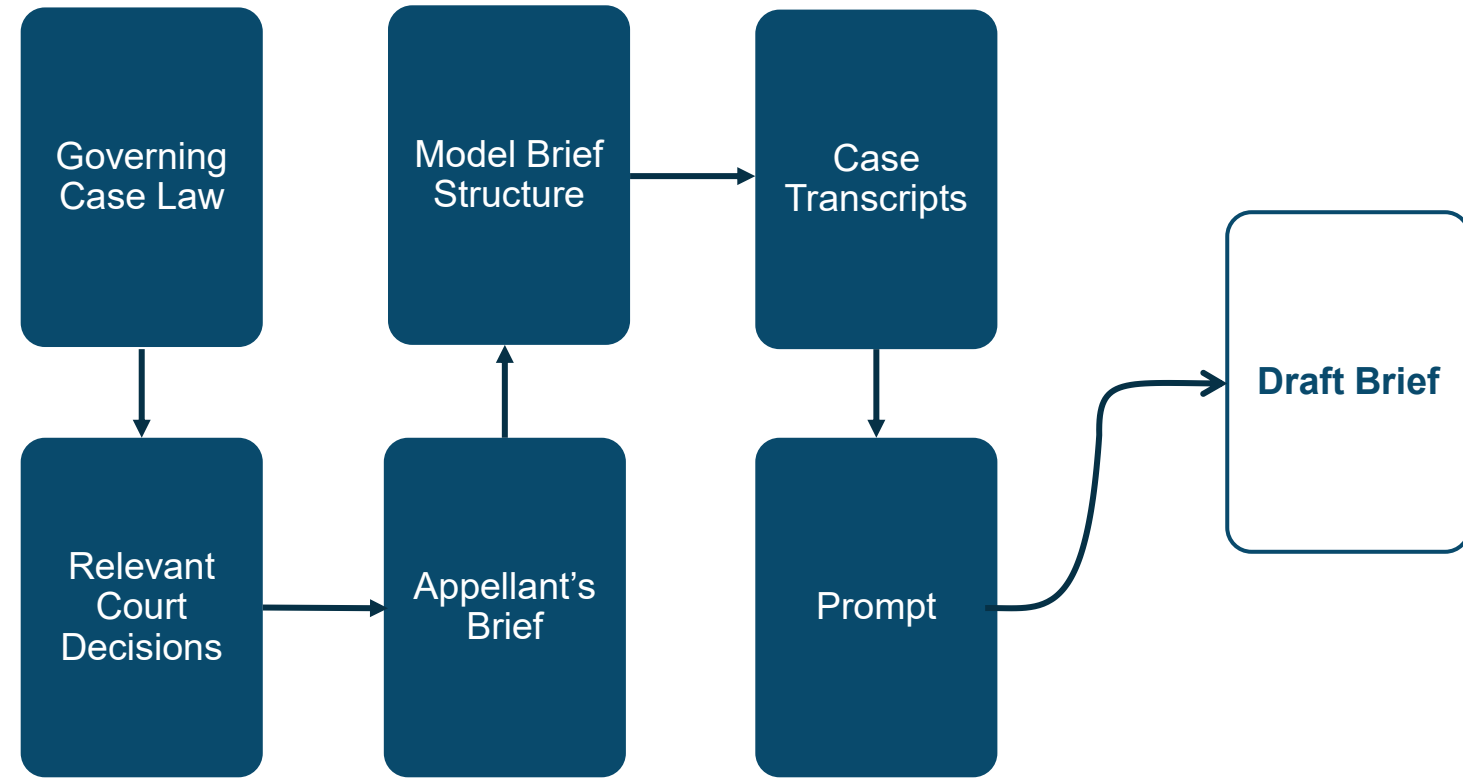
The screenshot shows the mlaGPT V3 interface. On the left is a dark sidebar with navigation options: '+ New Chat', 'Chat Bots', 'mlaGPT Presets', 'Chat History', 'App Launcher', 'mlaGPT Training', 'Glossary', 'Generative AI Policy', and 'Logout'. The main area has a dark background with the text 'Welcome to mlaGPT V3, Russ!' and 'How can I assist you today?'. Below this is the 'Upload Audio File' section, which includes instructions and a file upload area with a 'Choose File' button and an 'Upload' button. At the bottom, there is a chat input field with a 'Presets' dropdown and a 'Send' button. A footer note states: 'While mlaGPT aims for accuracy, users are responsible for fact-checking generated content.'

# TOMMY FISHER, ESQ. SUPER CHARGED KNOWLEDGEBASE



The screenshot shows the mlaGPT V3 interface. On the left is a dark sidebar with a menu: '+ New Chat' (green), 'Chat Bots' (blue), 'mlaGPT Presets', 'Chat History' (with a blue dot and arrow), 'App Launcher' (with a blue arrow), 'mlaGPT Training', 'Glossary', 'Generative AI Policy', and 'Logout' (red). At the bottom of the sidebar, it says '© 2025 Maryland Legal Aid. Session Updated: - 0'. The main area has a dark background with the text 'Welcome to mlaGPT V3, Russ!' and 'How can I assist you today?'. Below this is a yellow informational box about Retrieval-Augmented Generation (RAG). A blue bar contains a dropdown menu for 'MCLA KB Bot' and the text 'Use the dropdown to switch between bots.'. A white input field contains the text 'how to find someone that has been arrested' and a blue 'Submit' button. Below the input field, the text 'MCLA KB Bot Says:' is followed by a paragraph: 'To locate an incarcerated individual, you can use the following resources:'. A numbered list follows: '1. VINE (formerly Vinelink):' with four bullet points: 'Step 1: Visit [VINE's Maryland page](#).', 'Step 2: Click "Search for Someone."', 'Step 3: Select the appropriate state from the dropdown menu.', and 'Step 4: Enter the individual's name, ID, or case number. Searching by name will return the broadest results, which you can then narrow down by date of birth, case'.

# LEE OGBURN, ESQ. BRIEF DRAFTING ASSISTANT

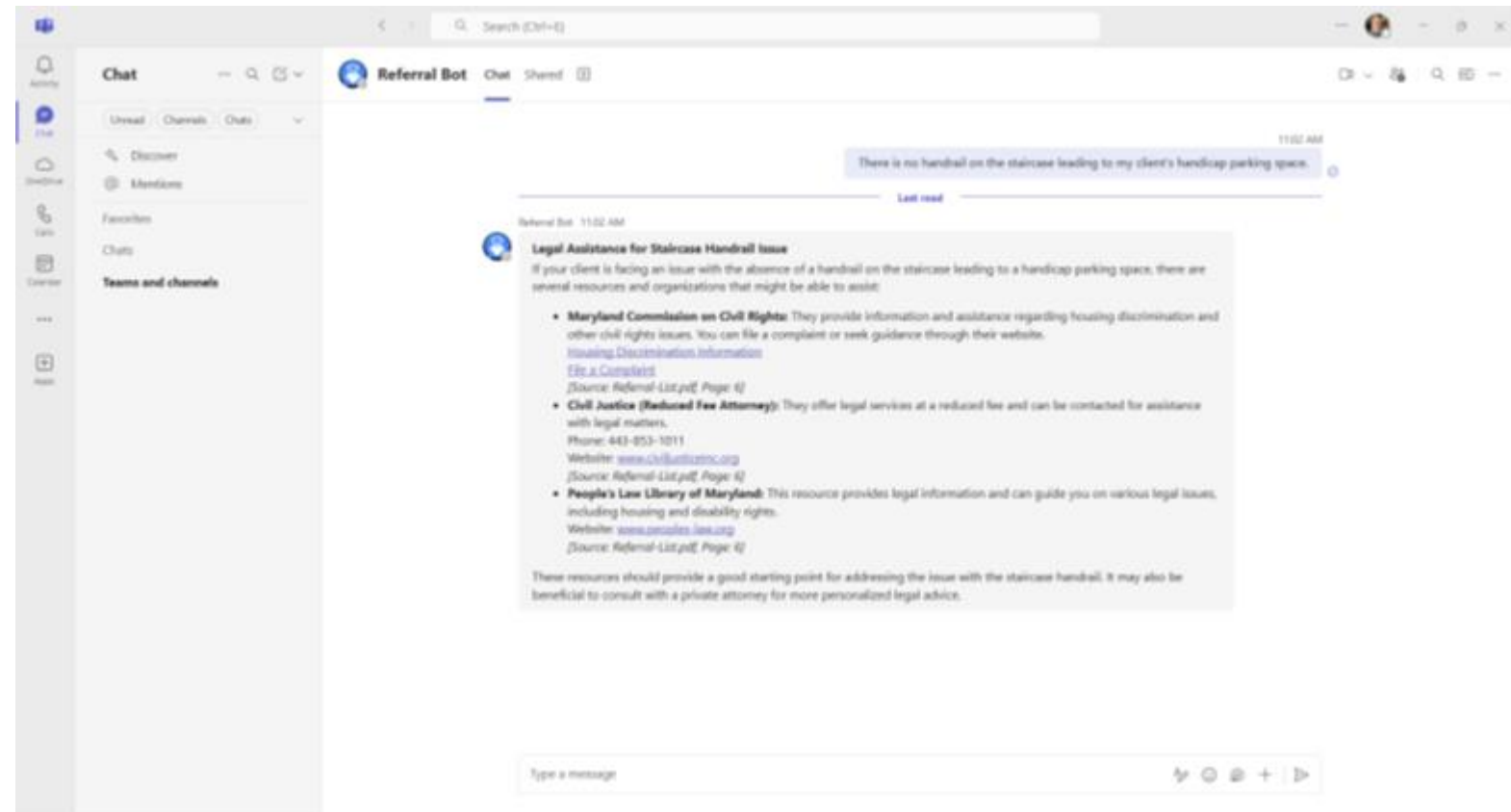


# TEAMS INTEGRATION

## RETRIEVAL-AUGMENTED GENERATION (RAG)

By embedding RAG into Teams chat, we prioritize ease of use and foster adoption through familiar workflows.

This drives faster efficiency gains and stronger staff engagement with the chat bot.



# ENSURE ETHICAL USE BUSINESS ASSOCIATE AGREEMENT (BAA) WITH OPENAI

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](mailto: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.

# ENSURE ETHICAL USE ZERO RETENTION ENDPOINTS (ZDR)

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>

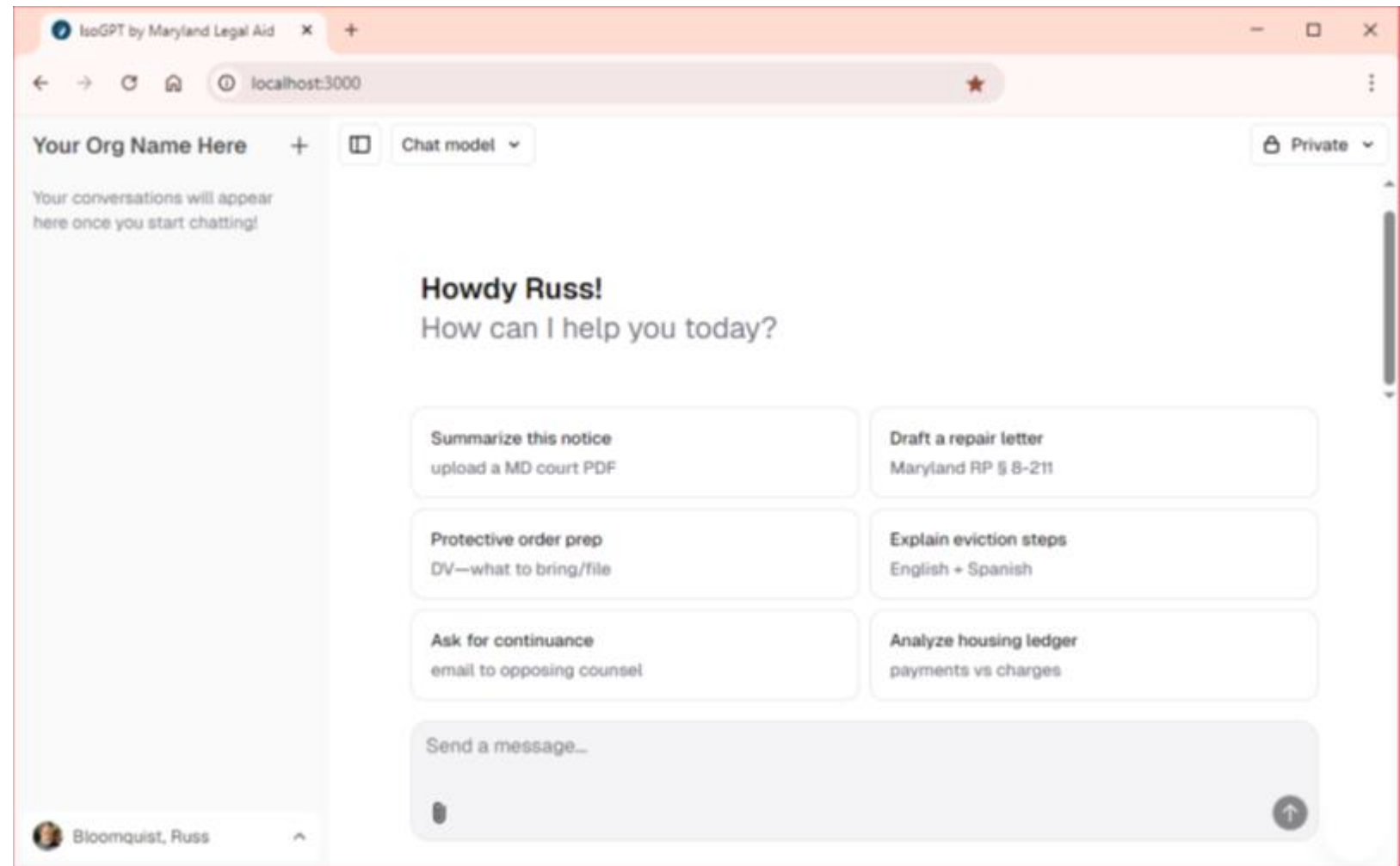
ENDPOINT	TRAINING ON DATA	DEFAULT RETENTION	ELIGIBLE ZDR
/v1/chat/completions*	No	30 days	Yes, with restrictions*
/v1/responses**	No	30 days	Yes, with restrictions*
/v1/audio/transcriptions	No	Zero data retention	-
/v1/embeddings	No	30 days	Yes

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

# WHAT'S NEXT?

We're excited to share what we've created and make it accessible to others!

A containerized version is in development and will be available on our GitHub, enabling organizations to download and deploy the tool in their own environments — locally (on their own computer) or on platforms like Azure, AWS, or Docker.







**THANK YOU**

Russ Bloomquist

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