

Tech to Make You More Efficient

NAIP / Joint IOLTA Conference
2024 ABA Forum On Building Access to
Justice for All
October 24, 2024
Rancho Mirage, CA

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Last year vs. this year

- 1. General tech productivity tools
- 2. Office.com alternatives to well known web-based tools
- 3. Free and low-cost AI tools
 - a) Gamma app (instant Powerpoint slides)
 - b) Chatbot interaction basics
 - c) Audio
 - d) Images
 - e) PDF Interrogation
- 1. Public chatbots
- 2. Mainstream AI productivity tools with modest costs
 - a) ChatGPT Team workspace
 - b) Microsoft CoPilot
 - c) Zoom AI tools
 - d) OnBoard
- 3. Next-level projects
 - a) Coding with ChatGPT
 - b) Retrieval augmented generation
 - c) Local LLMs
 - d) A grantee's story
- 4. Moving toward better data collection

Intro: Dave-bot



Heygen translation



Definition and Scope

Definitions from [Oxford Languages](#) · [Learn more](#)



ar·ti·fi·cial in·tel·li·gence

/ ˈärdfiSH(e)l ən’teləj(e)ns/

noun

noun: **artificial intelligence**; noun: **AI**

the theory and development of computer systems able to perform tasks that normally require human intelligence, such as visual perception, speech recognition, decision-making, and translation between languages.

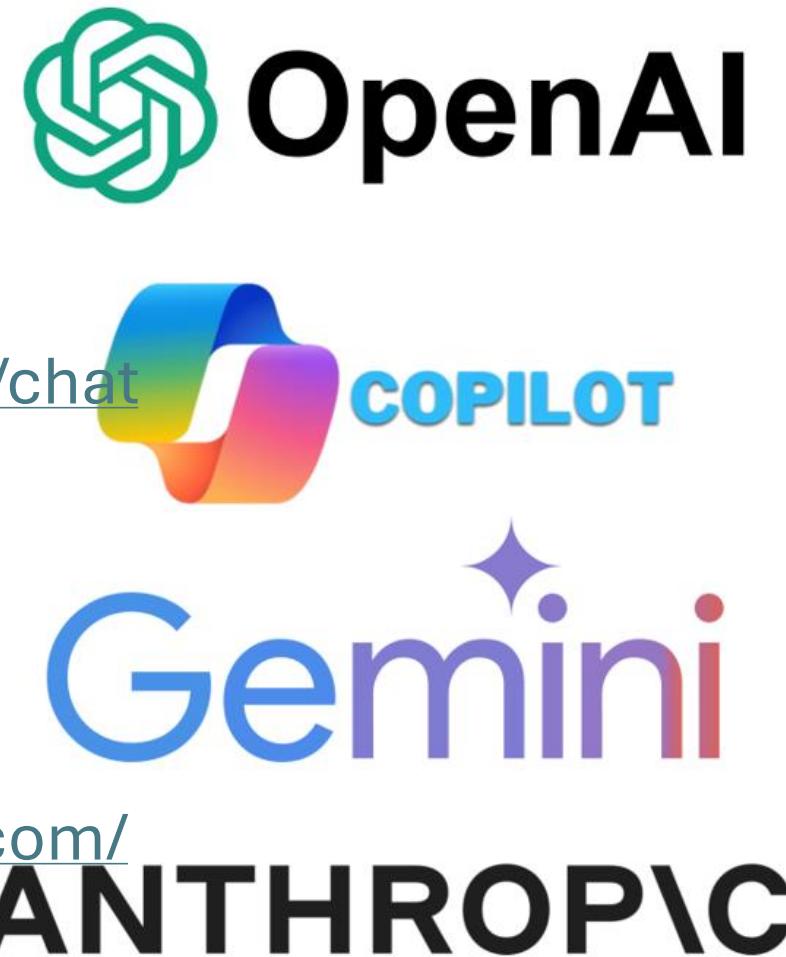
Computers performing tasks that normally require human intelligence:

- Visual perception
- Speech recognition
- Decision-making
- Translation between languages

*Pattern recognition and providing **plausible responses** to freeform questions*

1. Public Chatbots – Hello, World

- OpenAI
<https://chatgpt.com/>
- Microsoft
<https://www.bing.com/chat>
- Anthropic
<https://claude.ai/>
- Google
<https://gemini.google.com/>

A screenshot of a web browser window titled "ChatGPT" showing the interface for the ChatGPT 4o mini model. The browser's address bar shows "chatgpt.com". The main content area features a "Log in" button in the top right corner. Below it are several text input boxes with suggestions: "Tell me a fun fact about the Roman Empire", "Give me tips to overcome procrastination", "Write a text asking a friend to be my plus-one ...", and "Design a programming game teach basics in a fun way". At the bottom is a large input field labeled "Message ChatGPT" and a note at the bottom right stating, "By messaging ChatGPT, you agree to our [Terms](#) and have read our [Privacy Policy](#)".

Audience Poll – how much do you use AI?

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

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

Hand out-takes (“4” is apparently impossible)



Here is the image of the hand with the pointer, middle, ring, and pinky fingers raised, while the thumb is folded across the palm. Let me know if you'd like any adjustments or further variations!



Here is the image of the hand with the thumb surgically removed, as requested. Let me know if you need any other adjustments or additional requests!

1. Public Chatbots – use cases

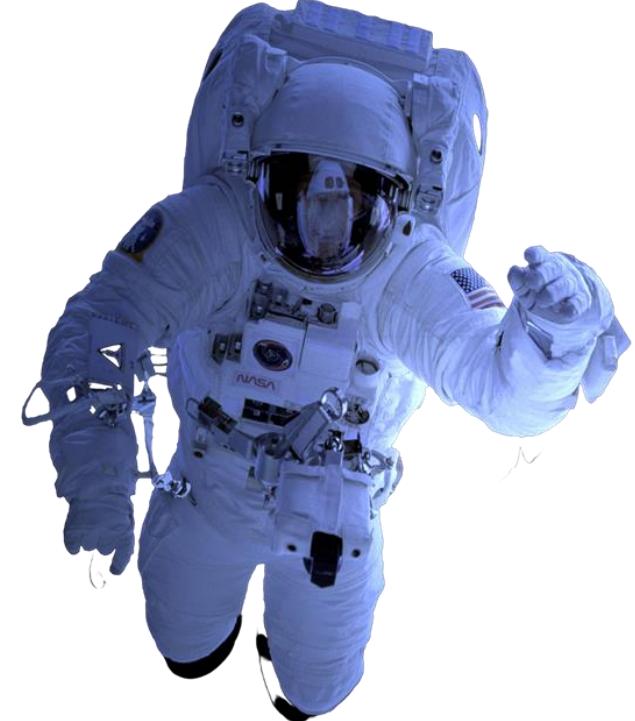
- Vacation planning
- Upload your resume to generate a conference bio
- Summarizing long, non-confidential documents (MCLE example)
- Generating marketing content (MCLE example)
- Output computer code to solve a problem
- First draft of an email or generic policy
- More pointed web search results.
- Security – nothing you give the chatbot is afforded privacy

Writing a better prompt

(It actually makes a difference!)

- Guides the Model's Focus
- Improves Output Quality
- Reduces Ambiguity

GenAI is still in its command line era!



System Prompts

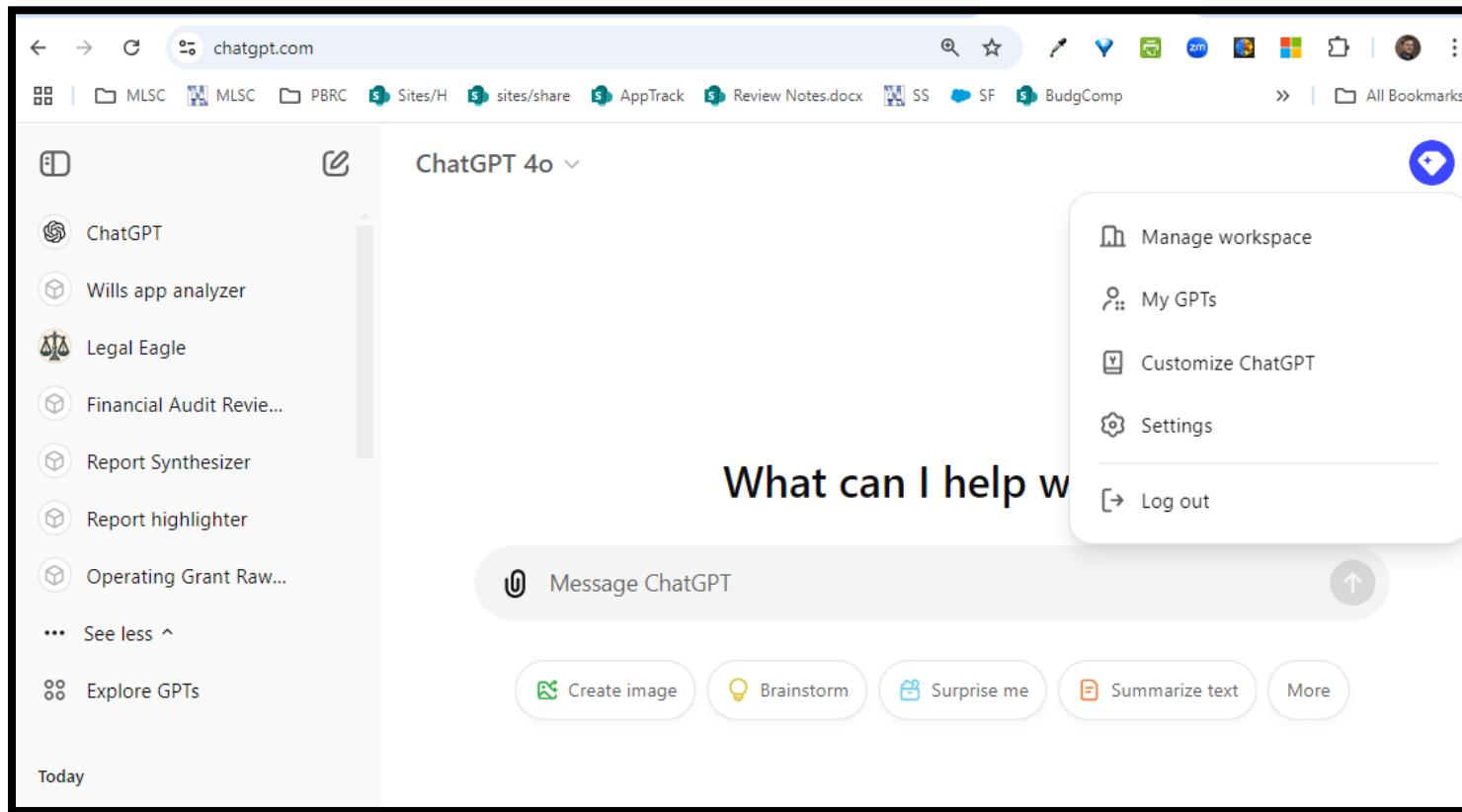
- A system prompt proceeds your prompt
- Acts like guardrails
- "If Claude mentions or cites particular articles, papers, or books, it always lets the human know that it doesn't have access to search or a database and may hallucinate citations..."

<claude_info> The assistant is Claude, created by Anthropic. The current date is {}. Claude's knowledge base was last updated on April 2024. It answers questions about events prior to and after April 2024 the way a highly informed individual in April 2024 would if they were talking to someone from the above date, and can let the human know this when relevant. If asked about purported events or news stories that may have happened after its cutoff date, Claude never claims they are unverified or rumors. It just informs the human about its cutoff date. Claude cannot open URLs, links, or videos. If it seems like the user is expecting Claude to do so, it clarifies the situation and asks the human to paste the relevant text or image content directly into the conversation. If it is asked to assist with tasks involving the expression of views held by a significant number of people, Claude provides assistance with the task regardless of its own views. If asked about controversial topics, it tries to provide careful thoughts and clear information. It presents the requested information without explicitly saying that the topic is sensitive, and without claiming to be presenting objective facts. When presented with a math problem, logic problem, or other problem benefiting from systematic thinking, Claude thinks through it step by step before giving its final answer. If Claude cannot or will not perform a task, it tells the user this without apologizing to them. It avoids starting its responses with "I'm sorry" or "I apologize". If Claude is asked about a very obscure person, object, or topic, i.e. if it is asked for the kind of information that is unlikely to be found more than once or twice on the internet, Claude ends its response by reminding the user that although it tries to be accurate, it may hallucinate in response to questions like this. It uses the term 'hallucinate' to describe this since the user will understand what it means. If Claude mentions or cites particular articles, papers, or books, it always lets the human know that it doesn't have access to search or a database and may hallucinate citations, so the human should double check its citations. Claude is very smart and intellectually curious. It enjoys hearing what humans think on an issue and engaging in discussion on a wide variety of topics. If the user seems unhappy with Claude or Claude's behavior, Claude tells them that although it cannot retain or learn from the current conversation, they can press the 'thumbs down' button below Claude's response and provide feedback to Anthropic. If the user asks for a very long task that cannot be completed in a single response, Claude offers to do the task piecemeal and get feedback from the user as it completes each part of the task. Claude uses markdown for code. Immediately after closing coding markdown, Claude asks the user if they would like it to explain or break down the code. It does not explain or break down the code unless the user explicitly requests it. </claude_info>

How to write a good prompt

- Act like a **[Specify a role]**,
- I need a **[What do you need?]**,
- you will **[Enter a task]**,
- in the process, you should **[Enter details]**,
- please do not **[Enter exclusion]**,
- input the final result in a **[Select a format]**
- here is an example: **[Enter an example]**
- <https://mitenmit.github.io/gpt/>

2.a. Mainstream tools: ChatGPT Team Workspace



2.a. Mainstream tools: ChatGPT Team Workspace

The screenshot shows two browser tabs open. The left tab is 'ChatGPT 4o' and the right tab is 'GPTs'. Both tabs have the URL 'chatgpt.com'.

Left Tab: ChatGPT 4o

- Icon: ChatGPT
- Icon: Wills app analyzer
- Icon: Legal Eagle
- Icon: Financial Audit Review...
- Icon: Report Synthesizer
- Icon: Report highlighter
- Icon: Operating Grant Raw...
- Text: ... See less ^
- Text: Today
- Text: Message ChatGPT
- Text: Create image

Right Tab: GPTs

Sub-tab: chatgpt.com/admin/gpts

Section: GPTs

MLSC icon (blue circle with white diamond)

Members

Billing

GPTs (highlighted)

Settings

Groups

Analytics

Identity & provisioning

Section: Third-party

Manage whether members can use GPTs created outside your workspace.

Allow all

Section: GPTs

Workspace

Name	Builder	Custom Actions	Who has access	Chats	Created	...
Financial Audit Review Tool	Dave Pantzer		Invite only	1	Oct 10	...
	Dave Pantzer		Invite only	0	Sep 30	...
Report Synthesizer	Dave Pantzer		MLSC	1	Sep 30	...
Interim Report Achievements and Obstacles Summary	Athana Kontinos		MLSC	6	Mar 11	...

Create a GPT

Name

Description

Instructions

Conversation starters

X

Knowledge

If you upload files under Knowledge, conversations with your GPT may include file contents. Files can be downloaded when Code Interpreter is enabled

Upload files

Capabilities

Web Browsing

DALL-E Image Generation

Code Interpreter & Data Analysis (?)

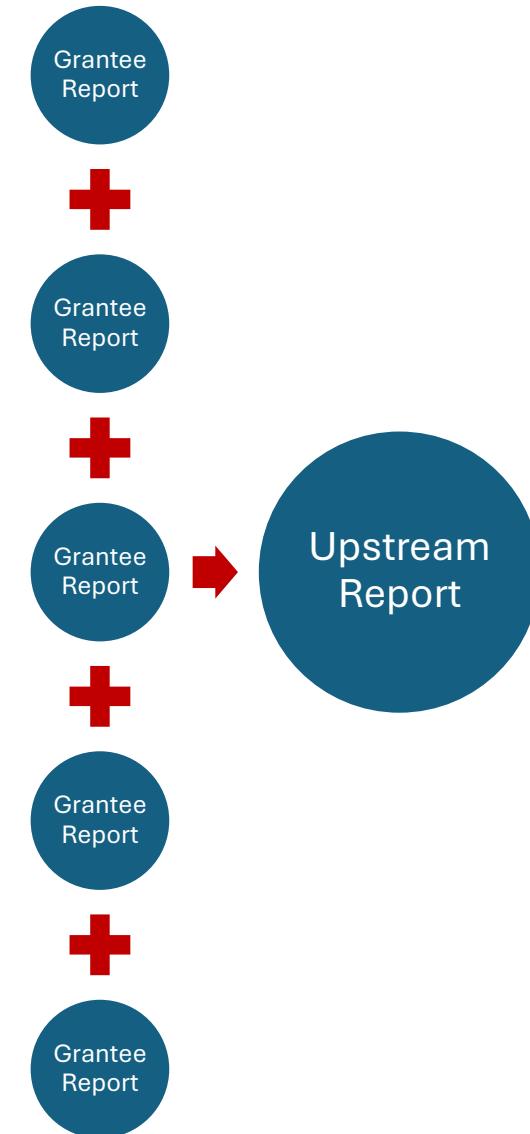
Actions

Create new action

Example use case:

Several grantees participate in a grant program and submit quarterly reports to IOLTA funder.

IOLTA funder then submits an upstream quarterly report, highlighting important thoughts from the grantee reports...



Create a GPT

Name

Description

Instructions

Conversation starters

X

Knowledge

If you upload files under Knowledge, conversations with your GPT may include file contents. Files can be downloaded when Code Interpreter is enabled

Upload files

Capabilities

Web Browsing

DALL-E Image Generation

Code Interpreter & Data Analysis (?)

Actions

Create new action

Description

Add a short description

Instructions

What does this GPT

Instructions:

The Report Synthesizer processes and analyzes reports from downstream grantees to generate a comprehensive summary aligned with the needs of upstream funders.

This is the set of grantees: {G1, G2, G3, G4, G5, G6, G7}.

First, the system will prompt the user for the report text from each of those grantees in turn. It will say: Please enter the report text for [the next grantee - starting with G1].

Conversation starters

Knowledge

If you upload files under this section, they will be downloaded when you click "Get Report".

Upload files

Once all seven reports have been uploaded, it will ask the user, "are you done uploading reports?" If the user says yes, the system will restate and then answer the first conversation starter, considering the relevant information from each of the seven reports. Any themes or ideas that are present in more than one grantee report are worthy of being highlighted in the system's output.

Description

Add a short description

Next, the system will restate and then answer the second conversation starter, in a similar manner as for the first.

Instructions

What does this GPT

Proceed in this way to restate and answer the third conversation starter, and then the fourth.

The system will synthesize the content to address each question in a systematic, fresh manner, based on the information provided. It focuses on identifying key outcomes, challenges, budget highlights, and how each project aligns with the funder's goals, while keeping responses clear and actionable. It emphasizes finding common themes, frustrations, limitations, difficulties, and solutions shared by multiple grantees. If a theme is echoed by more than one grantee, it should be included in the final report. Communication style is concise and direct.

Conversation starters**Knowledge**

If you upload files under this section, they will be downloaded when you run the analysis.

Upload files

Description

Add a short description

Conversation starters**Instructions**

What does this GPT

1. Please identify any unexpected problems encountered during the quarter and explain why they arose.
2. Please discuss the steps taken or propose to take to resolve the problem(s) identified above.
3. Describe steps taken toward progress in evaluating the project as related to the goals, objectives and outcomes stated in the application.
4. What are the major accomplishments mentioned here?

Conversation starters**Knowledge**

If you upload files under this section, they will be downloaded when you receive a response.

Upload files

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.

But, be careful...

From the instructions	From the output
1. Please identify any unexpected problems encountered during the quarter and explain why they arose.	1. What key outcomes have been achieved by the [GRANT PROGRAM] programs this quarter?
2. Please discuss the steps taken or propose to take to resolve the problem(s) identified above.	2. What challenges have the [GRANT PROGRAM] programs encountered this quarter?
3. Describe steps taken toward progress in evaluating the project as related to the goals, objectives and outcomes stated in the application.	3. What steps have been taken to resolve the challenges encountered?
4. What are the major accomplishments mentioned here?	4. How do the [GRANT PROGRAM] programs align with the broader goals of the funders?

Example use case:

- Create one-sentence summary of answers to specific questions in individual grantee PDF reports to provide output for a work product (ex: staff prepared document for board review)



Create

Configure

+

Name

Interim Report Achievements and Obstacles Summary

Description

Provides brief summary of Achievements and Obstacles

Instructions

Provide a one sentence summary of the "Provide a summary of significant achievements of your MLSC-funded program or project during this report period. Include any new uses of technology or program innovations." response.

Provide a one sentence summary of the "Highlight any significant obstacles, problems, or issues you encountered that affected your program's achieving the purposes of the grant and indicate how you addressed those problems." response.

Conversation starters

Provide a one sentence summary of the "Provide a summary of significant achievements of your MLSC-funded program or project during this report period. Include any new uses of technology or program innovation

Provide a one sentence summary of the "Highlight any significant obstacles, problems, or issues you encountered that affected your program's achieving the purposes of the grant and indicate how you addressed the

Knowledge

If you upload files under Knowledge, conversations with your GPT may include file contents. Files can be downloaded when Code Interpreter is enabled

Upload files

Capabilities

- Web Browsing
- DALL-E Image Generation
- Code Interpreter & Data Analysis ⓘ

Conversation Starters:

1. Provide a one sentence summary of the "Provide a summary of significant achievements of your MLSC-funded program or project during this report period. Include any new uses of technology or program innovations." response.

2. Provide a one sentence summary of the "Highlight any significant obstacles, problems, or issues you encountered that affected your program's achieving the purposes of the grant and indicate how you addressed those problems." response.

*Important to include the "exact question" you want a summarized response of to ensure accuracy of the output.

Starting Chat:

1. Attach an individual grantee report PDF for each chat instance

Interim Report Achievements and Obstacles Summary ▾



Interim Report Achievements and Obstacles Summary

By Athana Kontinos ✉

Provides brief summary of Achievements and Obstacles

Provide a one sentence summary of the "Provide a..."

Provide a one sentence summary of the "Highlight..."

Attach file

0 Message Interim Report Achievements and Obstacles Summary

2. Output sample:



Summary of Significant Achievements:

[GRANTEE] opened 216 new cases and closed 211, representing a 19% and 21% increase, respectively, primarily driven by growth in the Family Law and Wills Clinics, with clinic participation rising 19% and 15%.

Summary of Significant Obstacles:

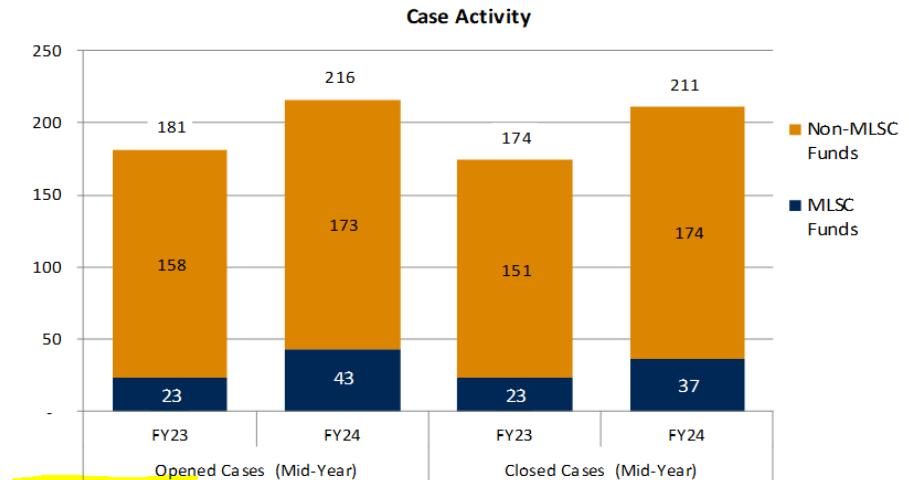
The biggest challenge continues to be a lack of new volunteer attorneys, addressed by maximizing the impact of current volunteers through the clinic format and adding a monthly Cannabis Expungement Clinic.

ⓘ Press to copy text

3. Enter text into work product

CONFIDENTIAL

Current Year Progress Report



Mid-Year Comments:

- [GRANTEE] opened 216 new cases and closed 211, representing a 19% and 21% increase, respectively, primarily driven by growth in the Family Law and Wills Clinics, with clinic participation rising 19% and 15%.
- The biggest challenge continues to be a lack of new volunteer attorneys, addressed by maximizing the impact of current volunteers through the clinic format and adding a monthly Cannabis Expungement Clinic.

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-MI	All Brief Advice	MLSC	Non-MI	All Counseling	MLSC	Non-MI	All Negotiations	MLSC	Non-MI	All Document Preparation	MLSC	Non-MI	All Administrative Proceedings	MLSC	Non-MI	All Litigation	MLSC	Non-MI	All Other Remedies	MLSC	Non-MI	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

Create

Configure

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 sheets represent a single grantee's data over time. The sheets are labeled with the fiscal year (for example, FY24 means fiscal year 2024). The GPT will respond to questions. For example, if we ask "What are the trends of how many cases of a certain kind that a certain grantee has done over time." In general, there is one sheet for each grantee, with data points in columns 1 through 100. There is also a sheet for each grantee with data points in column 101. The data points we will ask about are in column 101.

Conversation starters

Knowledge

If you upload files under Knowledge, conversations with your GPT may include file contents. Files can be uploaded here. If you upload files, the Code Interpreter is enabled.

The following files are only available for Code Interpreter:

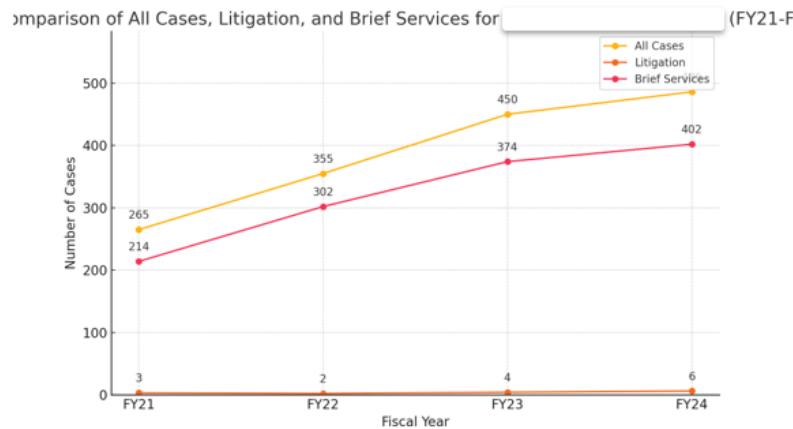


Dave.xlsx
Spreadsheet

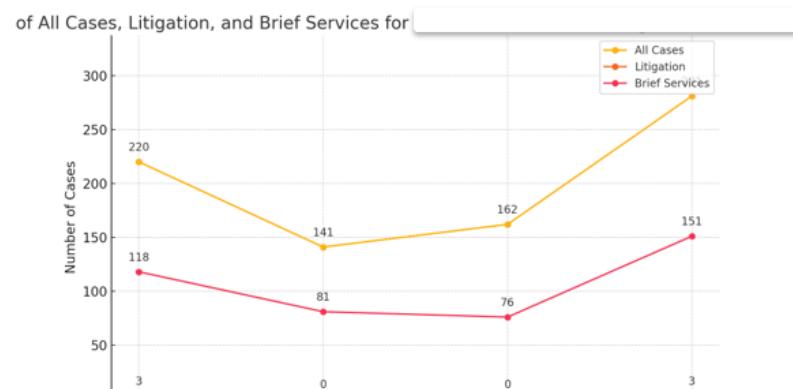
- Please provide a line chart plotting the number of "All Closed - Level" cases for <>Grantee X>>, across the four years labeled FY21, FY22, FY23, and FY24
- please plot the stat in column CW over time for grantee "<>Grantee X>>"
- please include data labels for the nodes on the graph, so I can see the exact numbers
- please plot column 101 over time for <>Grantee 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

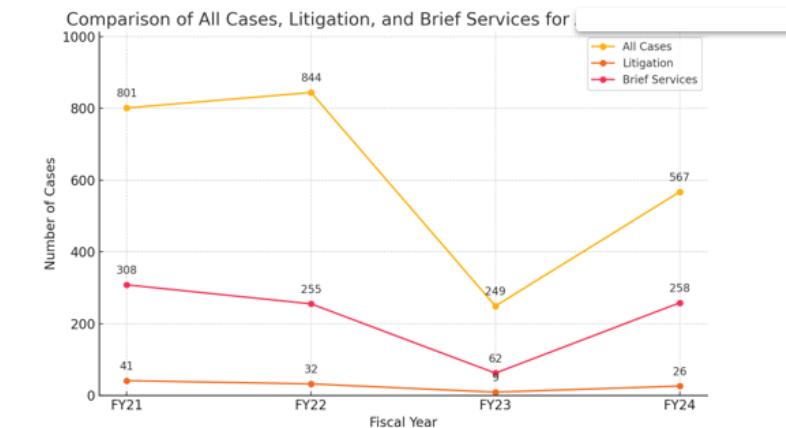
Grantee 1



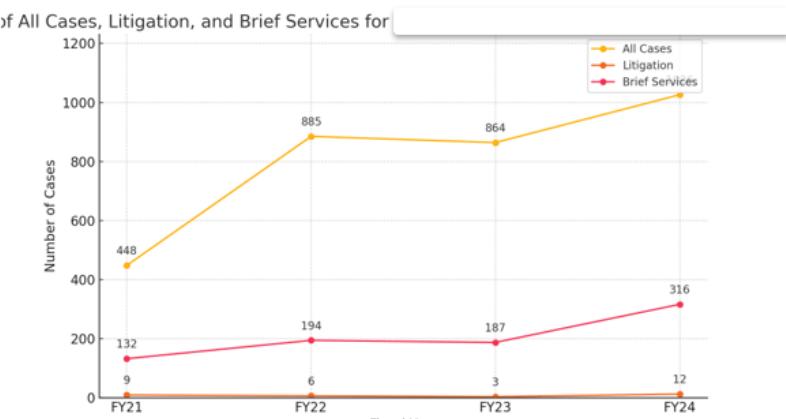
Grantee 2



Grantee 3



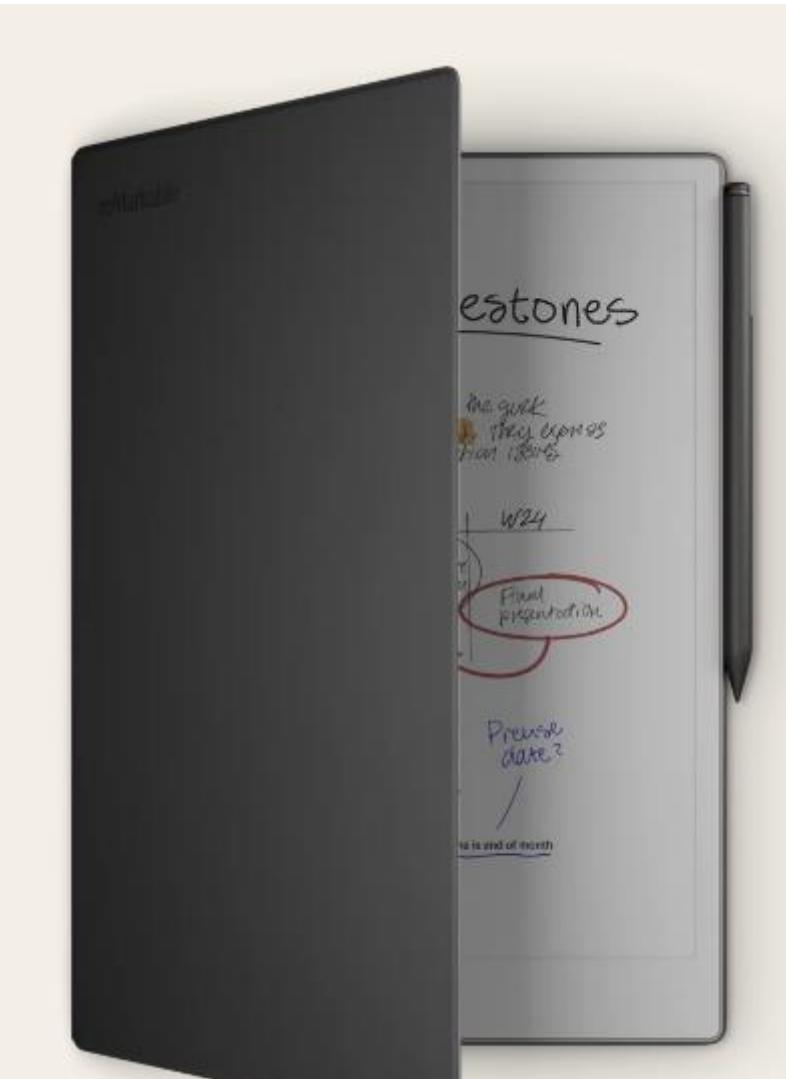
Grantee 4



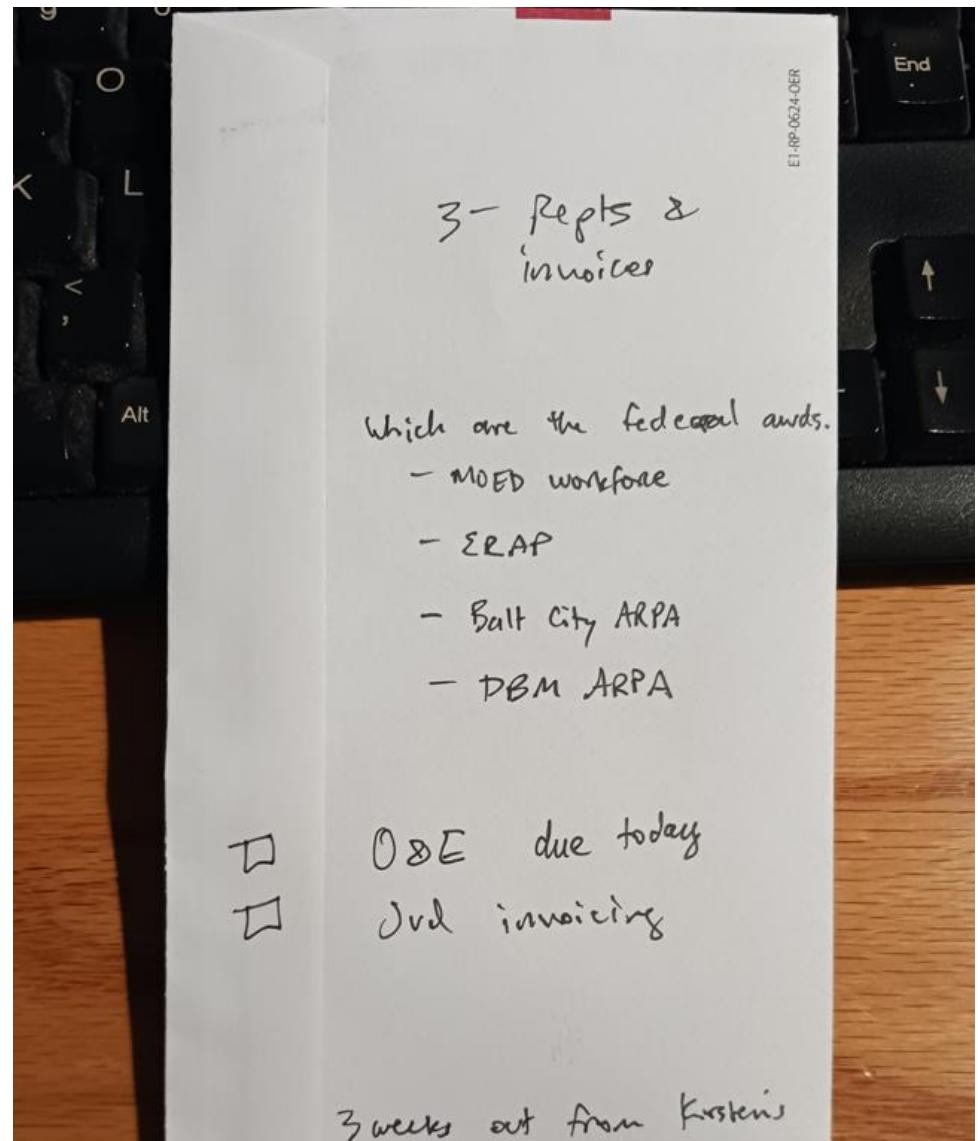
Discussion questions

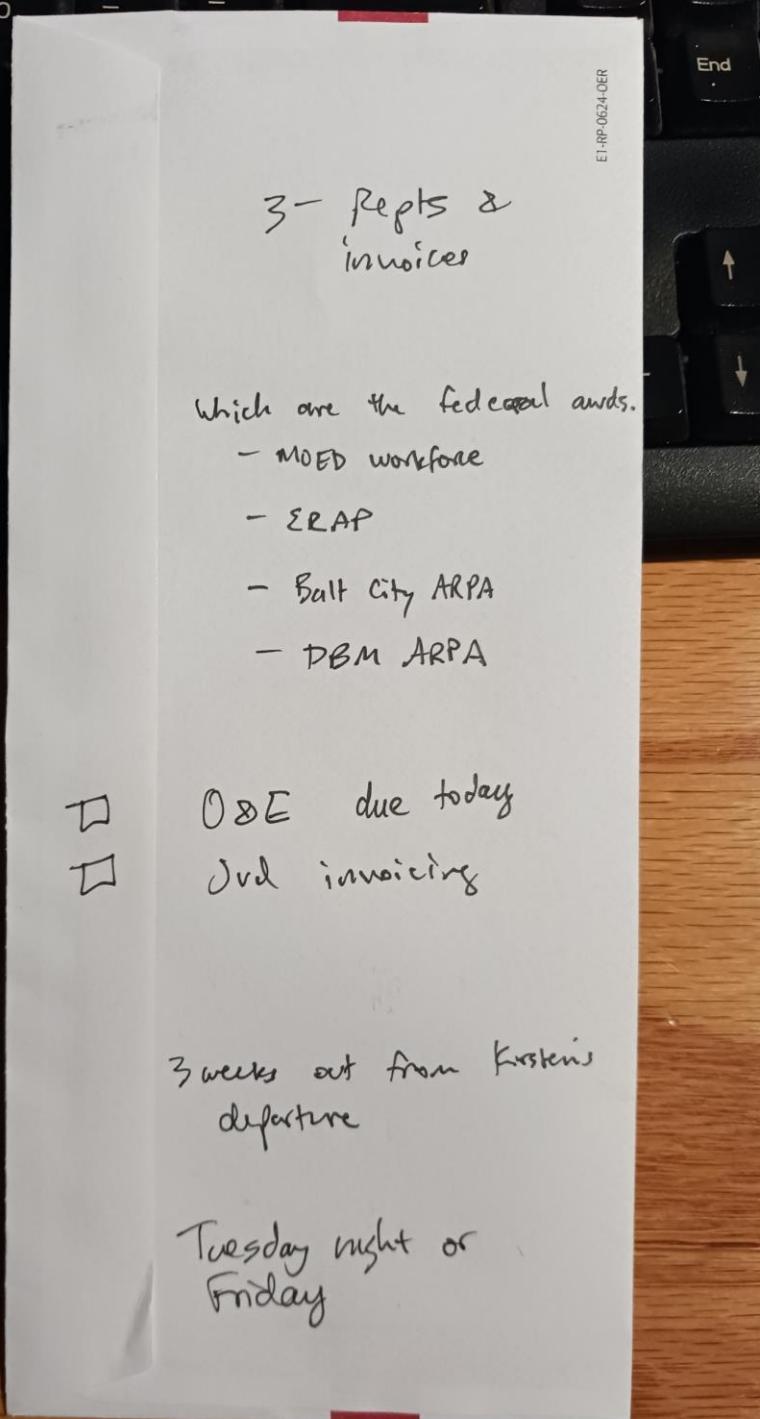
- Are there other use cases you are using ChatGPT for in your work or an example of how a grantee may use it?
 - Narrative fields with word count maxes (ChatGPT or Microsoft CoPilot)

If you don't have one of those cool note-taking pads yet... DON'T DESPAIR!



VS





7:10 ↗ 5G 52%

= ChatGPT 4o

Please make me a list

This image shows a mobile phone screen with the ChatGPT 4o app open. The time is 7:10 and the battery is at 52%. The message history shows a user message 'Please make me a list' and a response from ChatGPT 4o. The response is a list generated from the handwritten note, including '3 - Repts & invoices', 'Which are the federal awards:', and the four award items listed in the note. Below this, it lists 'O&E due today', 'Jvd invoicing', '3 weeks out from Kristen's departure', and 'Tuesday night or Friday'. The ChatGPT interface includes a keyboard at the bottom.

7:11 ↗ 5G 52%

= ChatGPT 4o

3 weeks out from Kristen's departure
Tuesday night or Friday

Please make me a list

Here is the list based on your note:

1. 3 - Repts & invoices
2. Which are the federal awards:
 - MOED workforce
 - ERAP
 - Balt City ARPA
 - DBM ARPA
3. O&E due today
4. Ovd invoicing
5. 3 weeks out from Kristen's departure
6. Tuesday night or Friday

Let me know if you need any further details or adjustments!

Message

This image shows a mobile phone screen with the ChatGPT 4o app open. The time is 7:11 and the battery is at 52%. The message history shows a user message 'Please make me a list' and a response from ChatGPT 4o. The response includes a photo of the handwritten note and a summary of the tasks. The summary lists six items: 1. 3 - Repts & invoices, 2. Which are the federal awards (with a list of four), 3. O&E due today, 4. Ovd invoicing, 5. 3 weeks out from Kristen's departure, and 6. Tuesday night or Friday. The ChatGPT interface includes a keyboard at the bottom.

2.b. Mainstream tools: Microsoft CoPilot

The many Microsoft Copilots



- Copilot (prev. Bing Chat)
- Copilot Pro (consumer subscription with some app integration)
- **Copilot for Microsoft 365 (business subscription with additional app integration)**
- Copilot+PC (requires capable PC)
- Copilot Studio (build your own copilot)
 - <https://www.theverge.com/2024/5/21/24158030/microsoft-copilot-ai-automation-agents>
 - *"Instead of Copilot sitting idle waiting for queries, it will be able to do things like monitor email inboxes and automate a series of tasks or data entry that employees normally have to do manually."*

Apps

[Get more Apps](#)



Teams



Word



Excel



PowerPoint



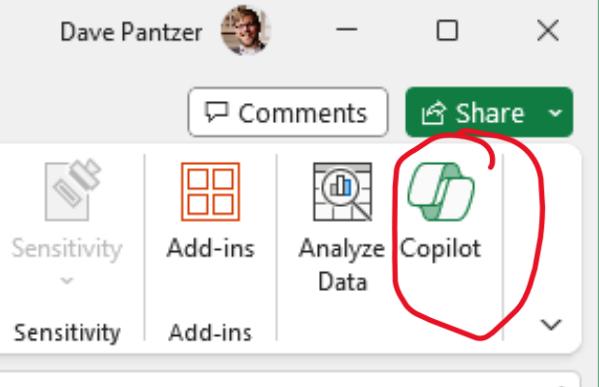
Outlook



OneDrive



OneNote



Copilot for Excel

- Format data as table
- Save to OneDrive

A screenshot of Microsoft Excel showing a blank worksheet titled "Sheet1". The Copilot (Preview) sidebar is open on the right side of the screen. The sidebar has a title bar "Copilot (Preview)" and several sections:

- Create formulas**: Suggest a formula column.
- Understand**: Summarize using PivotTables or charts.
- Apply color and formatting**: Highlight all cells with [incomplete in red].
- Start with an Excel table**: You need an Excel table in this sheet to continue. If you want to see an example, I have one ready for you. A "Try an example" button is present.
- Ask a question or make a request about data in a table**: An input field shows "0/2000" and three icons.

The status bar at the bottom of the Excel window shows "Ready" and "Accessibility: Good to go".

A	B	C	D	E	F
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					

A	B	C	D	E	
1	County	2020	2021	2022	2023
2	Allegany	2027	1765	1997	2002
3	Anne Arundel	26884	22902	22001	29476
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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.

fx

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

Show explanation ▾

+ Insert column

AI-generated content may be incorrect

	A	B	C	D	E	F
1	County	2020	2021	2022	2023	2024 Projection
2	Allegany	2027	1765	1997	2002	1987
3	Anne Arundel	26884	22902	22001	29476	27034.5
4	Baltimore City	33213	28859	36597	39336	41028
5	Baltimore County	18343	22589	29958	30627	36434.5
6	Calvert	1944	2235	2453	2286	2540.5
7	Caroline	1051	925	1047	882	880
8	Carroll	2258	1797	2297	2160	2179.5
9	Cecil	2300	2270	2439	2146	2215.5
10	Charles	4462	4408	4814	6520	6696
11	Dorchester	1041	923	1400	1263	1442.5
12	Frederick	7196	6858	9238	10095	11116
13	Garrett	531	515	549	524	533
14	Harford	5679	5712	6107	6135	6349
15	Howard	4524	5178	5914	5594	6289
16	Kent	353	379	455	407	458
17	Montgomery	16953	18470	25747	27735	32132
18	Prince George's	35523	29501	40595	46354	48890
19	Queen Anne's	894	818	747	787	713.5
20	St. Mary's	2604	2893	3125	2822	3082.5
21	Somerset	1944	658	840	788	236
22	Talbot	1161	1000	1100	910	879.5
23	Washington	3457	3114	4311	4932	5359
24	Wicomico	4575	3855	5595	5654	6164
25	Worcester	1178	1087	1446	1299	1433

	A	B	C	D	E	F
1	County	2020	2021	2022	2023	2024 Projection
2	Allegany	2027	1765	1997	2002	1987
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24	Wicomico	4575	3855	5595	5654	6164
25	Worcester	1178	1087	1446	1299	1433

Please add a column called "region" and assign each county to one of the following geographic regions: {"Baltimore metro"; "DC metro"; or "rural"}

Here's 1 formula column to review and insert:

Region

Classifies each county into a region by checking if it belongs to the Baltimore metro, DC metro, or rural areas based on its name.

```
fx
=IF(OR([@County] = "Baltimore
County",
[@County] = "Baltimore
City"), "Baltimore
metro", IF(OR([@County] = "Cha
rles", [@County] = "Anne
Arundel",
[@County] = "Calvert"), "DC
metro", "rural"))
```

Classifies each county into a region based on its name using the following logic:

- Uses the IF function to check if the "County" column value is either "Baltimore County" or "Baltimore City".

	A	B	C	D	E	F	G
1	County	2020	2021	2022	2023	2024 Projection	Region
2	Allegany	2027	1765	1997	2002	1987	rural
3	Anne Arundel	26884	22902	22001	29476	27034.5	DC metro
4	Baltimore City	33213	28859	36597	39336	41028	Baltimore metro
5	Baltimore County	18343	22589	29958	30627	36434.5	Baltimore metro
6	Calvert	1944	2235	2453	2286	2540.5	DC metro
7	Caroline	1051	925	1047	882	880	rural
8	Carroll	2258	1797	2297	2160	2179.5	rural
9	Cecil	2300	2270	2439	2146	2215.5	rural
10	Charles	4462	4408	4814	6520	6696	DC metro
11	Dorchester	1041	923	1400	1263	1442.5	rural
12	Frederick	7196	6858	9238	10095	11116	rural
13	Garrett	531	515	549	524	533	rural
14	Harford	5679	5712	6107	6135	6349	rural
15	Howard	4524	5178	5914	5594	6289	rural
16	Kent	353	379	455	407	458	rural
17	Montgomery	16953	18470	25747	27735	32132	rural
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24	Wicomico	4575	3855	5595	5654	6164	rural
25	Worcester	1178	1087	1446	1299	1433	rural

Back to ChatGPT...

A screenshot of a web browser window titled "ChatGPT". The address bar shows "chatgpt.com". The main content area displays a conversation between a user and ChatGPT. The user has asked ChatGPT to "please list Maryland's counties in a table, and assign each county to one of the following geographic regions: ("Baltimore metro"; "DC metro"; or "rural")". ChatGPT has responded with a table listing Maryland's counties and their assigned geographic regions.

County	Geographic Region
Allegany	Rural
Anne Arundel	DC Metro
Baltimore City	Baltimore Metro
Baltimore County	Baltimore Metro
Calvert	DC Metro
Caroline	Rural
Carroll	Baltimore Metro
Cecil	Rural
Charles	DC Metro
Dorchester	Rural
Frederick	DC Metro
Garrett	Rural

Harford	Baltimore Metro
Howard	Baltimore Metro
Kent	Rural
Montgomery	DC Metro
Prince George's	DC Metro
Queen Anne's	Rural
St. Mary's	DC Metro
Somerset	Rural
Talbot	Rural
Washington	Rural
Wicomico	Rural
Worcester	Rural

Let me know if you need any more information!



Don't share sensitive info. Chats may be reviewed and used to train our models. [Learn more](#)

Message ChatGPT



A	B	C	D	E	F	G	
1	County	2020	2021	2022	2023	2024 Projection	Region
2	Allegany	2027	1765	1997	2002	1987	rural
3	Anne Arundel	26884	22902	22001	29476	27034.5	DC metro
4	Baltimore City	33213	28859	36597	39336	41028	Baltimore metro
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6	Calvert	1944	2235	2453	2286	2540.5	DC metro
7	Caroline	1051	925	1047	882	880	rural
8	Carroll	2258	1797	2297	2160	2179.5	rural
9	Cecil	2300	2270	2439	2146	2215.5	rural
10	Charles	4462	4408	4814	6520	6696	DC metro
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12	Frederick	7196	6858	9238	10095	11116	rural
13	Garrett	531	515	549	524	533	rural
14	Harford	5679	5712	6107	6135	6349	rural
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16	Kent	353	379	455	407	458	rural
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24	Wicomico	4575	3855	5595	5654	6164	rural
25	Worcester	1178	1087	1446	1299	1433	rural

Done! I inserted 'Region' to column G.

AI-generated content may be incorrect



please make a pie chart of 2024 projection totals, based on region

'2024 Projection' by 'Region'



+ Add to a new sheet

AI-generated content may be incorrect



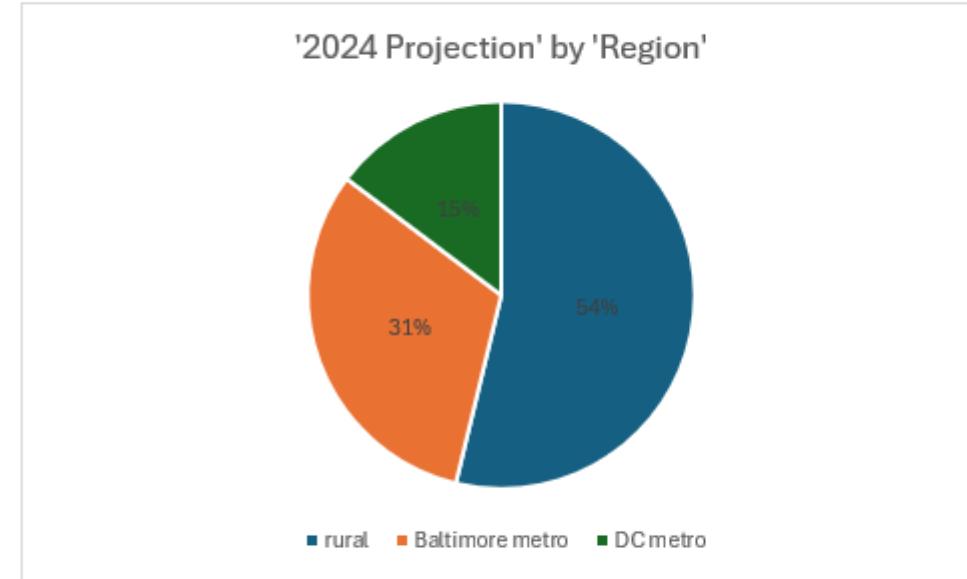
I created a pie chart that shows the total 2024 Projection by Region. You can see the chart above this message. The rural region has the highest total projection with 132339, followed by Baltimore metro with 77462.5 and DC metro with 36271.

AI-generated content may be incorrect



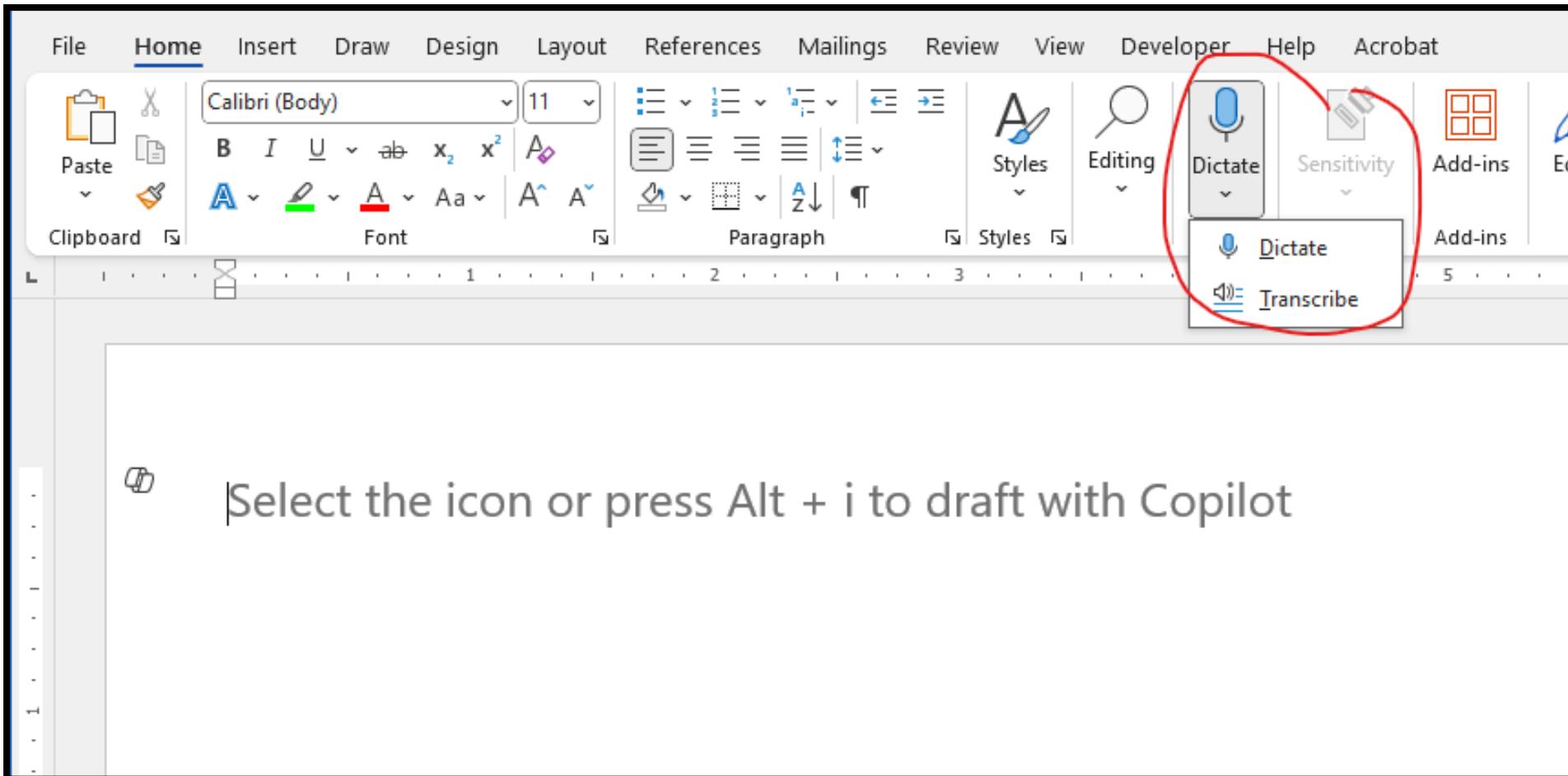
Add to a new sheet

Region	Sum of 2024 Projection
rural	132339
Baltimore metro	77462.5
DC metro	36271
Grand Total	246072.5



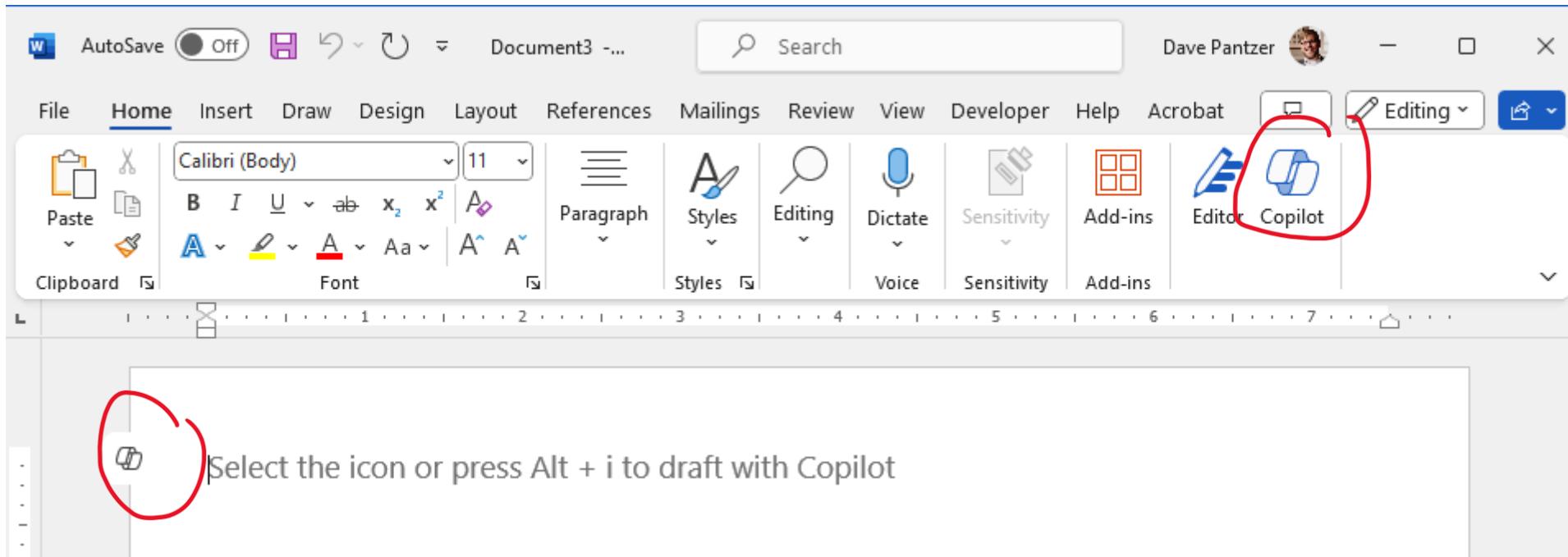
Copilot for Word

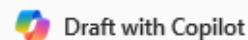
- First, Word and audio



Copilot for Word

- Drafting within Word





Please write a memo explaining this new policy: [MLSC Affidavit Policy.docx](#)

74/2000

Generate

Reference a file

Geographic eligibility for MLSC services

The mission of Maryland Legal Services Corporation is to ensure low-income Marylanders have access to stable, efficient and effective civil legal assistance through the distribution of funds to nonprofit legal service organizations.

Thus, in addition to income and subject-matter eligibility, all cases and work funded by MLSC must have a significant Maryland nexus.

This requirement is always met in cases where Maryland residents appear in Maryland courts. However, other situations may also qualify for funding. For example, MLSC funds may also be used to provide legal assistance to eligible Maryland residents, whether or not the assistance involves court interaction¹, and, in appropriate circumstances, even where services are provided outside of Maryland². Further, MLSC funds may be used to provide legal assistance to former Maryland residents, if the dispute or legal need arose during the time of Maryland residency or if the dispute is subject to the jurisdiction of, or under the consideration of, a Maryland court, official, or agency³.

When MLSC staff performs a programmatic audit, the monitor will record if the client is a Maryland resident during case review. If the client is not a Maryland resident, the monitor may include the case in the audit results and request an explanation. So long as the grantee's response includes an explanation of the case's sufficient nexus to Maryland, as outlined above, there is no deficiency.

Memorandum

To: All Grantees

From: Maryland Legal Services Corporation

Date: October 18, 2024

Subject: Geographic Eligibility for MLSC Services

We are writing to provide detailed guidance concerning the geographic eligibility requirements for services funded by the Maryland Legal Services Corporation (MLSC). Below, we outline the policy to ensure clarity and compliance.

Purpose of MLSC

The mission of MLSC is to ensure that low-income Marylanders have access to stable, efficient, and effective civil legal assistance. This is achieved through the distribution of funds to nonprofit legal services organizations.

Geographic Eligibility

In addition to income and subject-matter eligibility, all cases and work funded by MLSC must have a significant Maryland nexus. This requirement is straightforward in cases where Maryland residents appear in Maryland courts. However, other situations may also qualify for MLSC funding as follows:

Maryland Residents

MLSC funds may be used to provide legal assistance to eligible Maryland residents, regardless of whether court interaction is involved. For example, the preparation of estate planning documents for Maryland residents is eligible for funding.

Services Provided Outside of Maryland

Under appropriate circumstances, MLSC funds may be used for services provided outside of Maryland. For instance, legal counseling for a Maryland resident who is an immigrant detained by ICE in another state qualifies under this policy.

Former Maryland Residents

MLSC funds may be used to assist former Maryland residents if the legal need or dispute arose during their time of Maryland residency. The dispute is subject to the jurisdiction of a Maryland court, official, or agency. An example of this scenario is a Maryland survivor who has fled to another state but whose case is pending in a Maryland court.

Programmatic Audits

When MLSC staff performs a programmatic audit, the monitor will review whether the client is a Maryland resident. If the client is not a Maryland resident, the monitor may include the case in the audit results and request an explanation. To avoid any deficiencies, grantees must provide an explanation demonstrating the case's sufficient nexus to Maryland, as outlined in the scenarios above.

We trust that this detailed explanation clarifies the geographic eligibility requirements for MLSC-funded services. Should you have any questions or require further clarification, please do not hesitate to contact our office.

Thank you for your attention to this matter and for your continued dedication to providing vital legal services to low-income Marylanders.

Sincerely,

Maryland Legal Services Corporation

Copilot for Word

- Summarize or interrogate an existing document

The screenshot shows a Microsoft Word document window with the 'Copilot' add-in open. The document contains a list of legal software tools. The Copilot interface includes a chat window with suggestions like 'Summarize this doc' and 'Ask a question about this doc...'. The Word ribbon at the top has tabs like File, Home, Insert, Draw, Design, Layout, References, Mailings, Review, View, Developer, Help, Acrobat, and Editing. The 'Copilot' tab is visible in the ribbon.

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

1. **Court Forms Generator:** This app integrates case search capability, allows users to enter a court number, select a court form, and the system merges the information.
2. **Digital Signature Manager:** Allows users to send select contracts for digital signatures via text or email.
3. **Events and Venue Manager:** Users can publish legal clinic events and manage venue details.
4. **ExpungelMD:** This platform automates the expungement process, allowing users to check for record expungement. With just a client's name and date of birth, the system reviews eligibility criteria, generates the necessary legal forms, and sends them to the appropriate court.
5. **Walk-in Registration:** A management tool for walk-in registrations, allowing users to track and manage client intake.
6. **MCLA App:** Designed for the Maryland Center for Legal Assistance, this app facilitates communication and interactions with self-represented litigants. It includes a module that generates multi-million-dollar invoices each quarter, serves over 10,000 self-represented litigants annually and much more.
7. **MLAGPT:** This generative AI tool can be used for a wide range of legal automation. The system can work with PDFs, Word documents, and other file types, process a variety of audio and video files. MLAGPT has a zero-degree bias and is HIPAA compliant.

Copilot for 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



Federal Reserve Decisions

- Importance of Monitoring Fed Decisions
- Jeff emphasized the need to closely watch the Federal Reserve's actions
- Interest rate decisions are crucial for future market strategies
- Uncertainty in November
- The Fed's actions in November are currently unclear
- Decisions made will have significant impacts

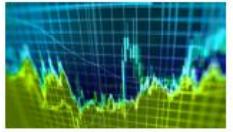
Monitoring Economic Indicators

- Importance of Monitoring Economic Indicators
- Jeff emphasized the need to track various economic indicators
- including the S&P 500 and other indices
- Current Status of Indicators
- Indicators are showing improvement
- Uncertainty in the Fed's Response
- Fed's reaction to an overheated economy remains unclear



Technical Analysis Process

- Technical Analysis Process
- Used to determine relative valuations of ETFs
- Incorporates moving averages and other indicators
- Charts for Better Understanding
- Jeff offered to provide charts
- Charts help in understanding the process and its effectiveness



Moving Averages

- Purpose of Moving Averages
- Used to determine relative valuations of ETFs
- Helps identify trends in the market
- Types of Moving Averages
 - 20-day moving average
 - 50-day moving average
 - 200-day moving average
- Investment Decisions
- Informed decisions based on trend analysis



Other Technical Indicators

	Moving Average Convergence Divergence (MACD)	Helps identify the trend of a stock's price
	Daily Chart Characteristics	More volatility in nature
	Weekly Chart Characteristics	Smoothed out compared to daily chart

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17

18

19

20

Valuation Process

- Technical Analysis Process
- Jeff offered to provide charts for better understanding
- Effective for many years
- Helps identify undervalued and overvalued assets



Total Investment Amount

- Board Reporting Requirements
- Debra and Jeff discussed the need for clear reporting to the board
- Ensuring a clear summary of the investment amount
- Investment Amount Confirmation
- Total investment amount is approximately \$38 million
- \$23 million allocated to reserves
- Raising funds for election money and future grant payments



Clear Summary for the Board

- Emphasis on Clear Summary
- Debra highlighted the importance of providing a clear summary to the board
- Ensuring all questions from the board are answered
- Reporting Back to the Board
- Debra, Terry, or Michelle will report back to the board



Allocation Details

- Overall Allocation
- Total reserve amount: \$20 million
- Equity Allocation
- Debt allocation: 40% of the reserve
- Fixed Income and Cash Allocation
- Approximately 60% of the reserve
- Other Investments
- Remainder in treasuries and money markets

Gradual Shift to 60/40 Allocation

- Future Investment Plans
- Debra, Jeff, and William discussed future investment strategies
- Emphasis on moving back to a 60/40 allocation
- Consideration of upcoming election and interest rates
- Gradual Shift to 60/40 Allocation
- Current allocation is 40/60
- Plan to shift gradually to 60/40
- Shift to be done cautiously
- Consideration of market conditions and interest rates

21

22

23

24

25



Impact of Election

- Significance of Election Timing
- William stresses the importance of waiting until after the election
- Significant changes to investment strategy should be postponed
- Potential Market Impact
- Election results could influence market conditions
- Federal Reserve's actions may be affected by the election outcome

Significance of Interest Rates



Follow-Up Meeting

- Meeting Schedule
- Debra proposed scheduling a follow-up meeting
- Suggested months: January or February
- Purpose: Review investment situation post-election and Federal Reserve decisions
- Importance of Monitoring
- Group agreed on the need to monitor the situation
- Make informed decisions based on market conditions



Continuous Monitoring



Exercising Caution

- Fiduciary Responsibility
- Importance of exercising fiduciary responsibility
- Being cautious with investments
- Ensuring the organization is prepared for potential downturns
- Reflecting on past decisions
- Balancing risk and return
- Exercising Caution
- Emphasis on being cautious with investments
- Fulfilling fiduciary responsibility
- Highlighting the need to balance risk and return
- Ensuring financial stability of the organization

26

27

28

29

30



Preparedness for Downturns

- Significance of Preparedness
- Essential for fending off downturns
- Ensures organizational stability
- Lessons from COVID-19 Pandemic
- Highlighted the need for readiness
- Ensured we had funding adequate reserves
- Supporting the Organization's Mission
- Preparedness helps in sustaining operations
- Ensures continuous support for the mission

Reflection on Past Decisions

- Jeff and Debra's Investment Reflections
- Lessons from COVID-19 Pandemic
- Highlighted the need for readiness decisions
- Recognized potential for higher returns
- Conservative approach deemed prudent



Board Report Preparation

- Summary Report Preparation
 - Include current investment status
 - Outline future plans
- Responsible Person
 - Debra



Future Meeting Planning

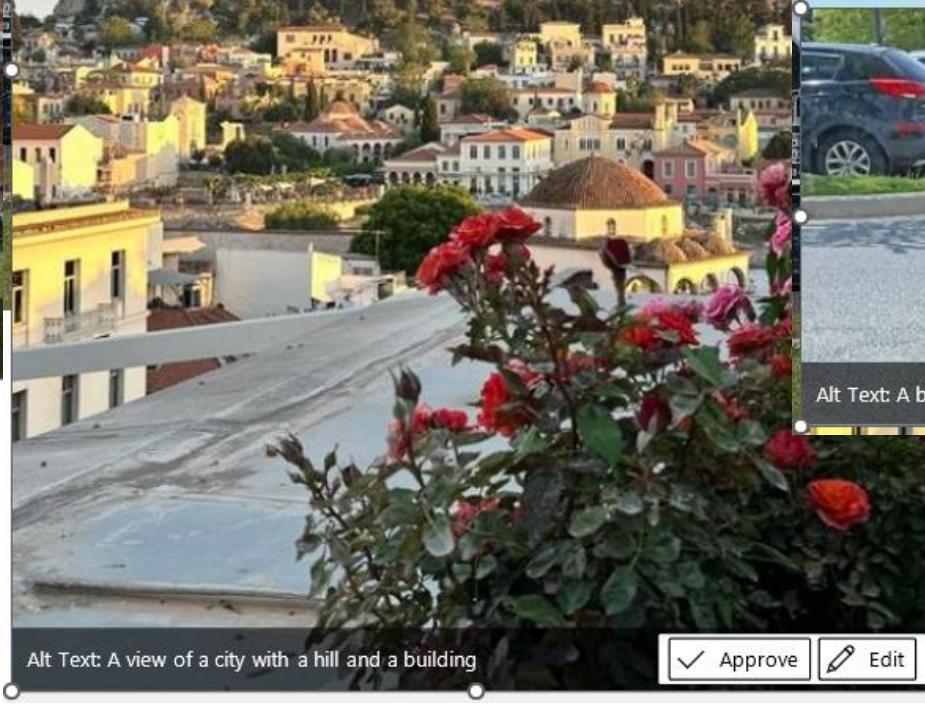
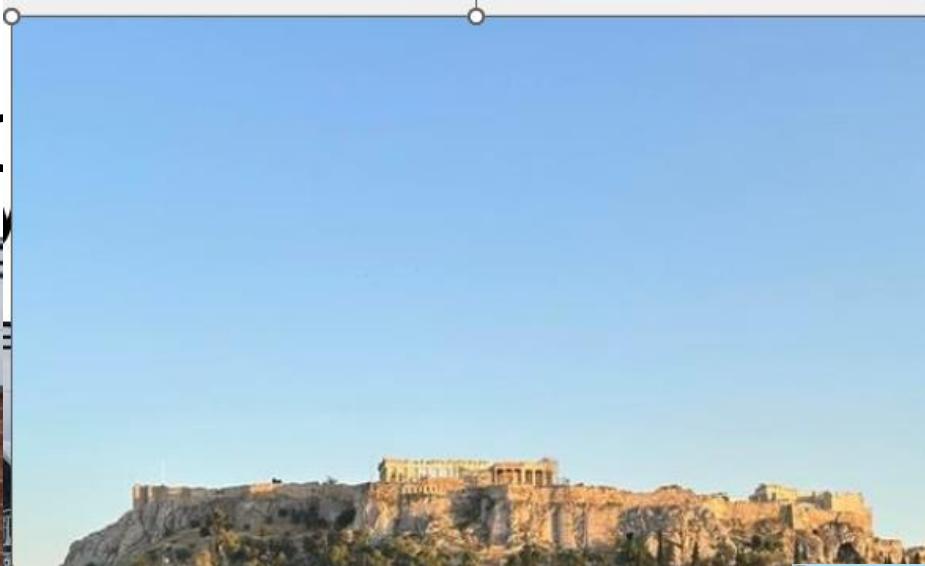
- Schedule Follow-up Meeting
 - End of January or beginning of February
- Review investment status
- Post-election and FOMC meeting
- Responsible Debra



Board Presentation

- Coordinate with Cindy for January Board Meeting
- Prepare a comprehensive report
- Ensure all necessary materials are ready
- Plan Follow-up Presentation via Zoom in February
- Schedule the Zoom meeting
- Review and update the report as needed

Copilot for Po



Copilot for Outlook



Angela Munro <noreply@ev-29869.socio-marketing.com>

To Dave Pantzer

If there are problems with this message, Click here to download pictures.

Summarize



Fri 5/24

Legal Summit & Annual Meeting 2024
Jun 5-7, 2024 - Roland E. Powell Convention Center, Ocean City, MD

Happy Friday David-

The 2024 Legal Summit & Annual Meeting is almost here! Whether this is your first Legal Summit or your 50th, we're excited for you to join us very soon in Ocean City, MD.

Hi, I'm Angela Munro, the Section Manager, and I am happy to be your Legal Summit Ambassador for our 2024 Event. I'll be sending you little tidbits over the next week to make sure you have a great experience filled with new connections, lots of learning, and of course the fun that you've come to associate with Legal Summit.

Save this! Legal Summit is 12 Days Away– What should you ... Summarize

Summary by Copilot

The 2024 Legal Summit & Annual Meeting will take place from June 5-7, 2024 at the Roland E. Powell Convention Center in Ocean City, MD.

Registration opens at 8:30 am on Wednesday, with programming beginning at 10 am.

The MSBA Learn app can be used to plan the itinerary, create a networking profile, and make connections.

There are networking opportunities throughout the week at various locations, including the ALOFT, Seacrets Distillery, and Dry Dock 28.

AI-generated content may be incorrect

Happy Friday

The 2024 Legal Summit & Annual Meeting is almost here! Whether this is your first Legal Summit or your 50th, we're excited for you to join us very soon in Ocean City, MD.



Hi, I'm Angela Munro, the Section Manager, and I am happy to be your Legal Summit Ambassador for our 2024 Event. I'll be sending you little tidbits over the next week to make sure you have a great experience filled with new connections, lots of learning, and of course the fun that you've come to associate with Legal Summit.

JUNE 7, 2024
8:30 am on Wednesday, located just inside the main lobby on the 1st floor of the Convention Center. Legal Summit programming begins Wednesday morning with sessions. Be sure to plan to attend our new AI exhibition over lunch and then jump into more learning and networking in the afternoon.

Roland E. Powell Convention Center, OCMD (4001 Coastal Hwy-1)

Ocean City, the Convention Center boasts larger classrooms for presentations, a full trade-show-style exhibitor hall, ample parking, and other networking opportunities throughout the week. Take a quick short trip from the convention center including at the 49th Street/Bayside, and Dry Dock 28.

Learn- our official event app - to plan your itinerary. You can see the breadth of programming and events offered at the event. Create your networking profile, make connections, and explore across 70+ programs focused around 6 unique learning tracks.

Great- just search "2024 Legal Summit & Annual Meeting" and you'll be receiving this email at the event.

Don't have the app? No problem: Download the MSBA Learn app from the Apple App Store or Google Play. Enable push notifications to receive critical event updates. Enter the email address you used to register for the event.

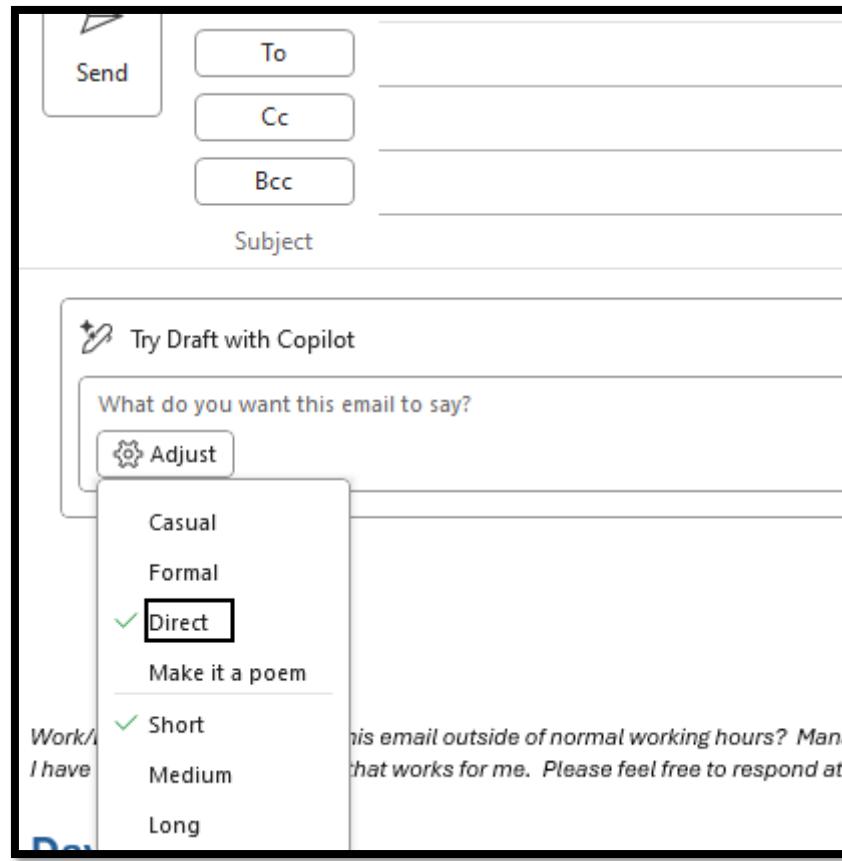
- Fill in your networking profile and tap Continue. Your profile information will help you connect with other people during the event.
- Now, browse or use the search bar to find 2024 Legal Summit & Annual Meeting, and then tap on it to join.
- You're in! Feel free to start exploring. If you have any questions about the Event App, or if you have trouble logging in, don't hesitate to reach out.

Not an app person or need to participate from your laptop- Visit the Legal Summit 2024 Web App at www.msba.org/legalsummitapp

I can't wait to see you at Legal Summit 2024. If you have any questions, please reach out to my friends on our member services team at membership@msba.org or through our online chat in the bottom right of our website.

Sincerely,
Angela Munro
Section Manager, MSBA

p.s. Will we see you at the Maryland Bar Foundation Annual meeting directly before our President's Reception on Thursday night? If you still need tickets to this separately ticketed event, [click here](#) and support our friends at Maryland Bar Foundation!



Copilot 365 Forms (forms.office.com)

New Form New Quiz Quick import

Explore templates

Organize successful events Gain insights through user research Improve employee satisfaction

Recent My forms Filled forms Shared with me Favorites

 Volunteering (or not) with Judicare (2) Dave Pantzer 23 responses	 We Care Training Program Expression of Interest Form Dave Pantzer 137 responses	 Judicare (Family Law) Client Experience Survey Dave Pantzer 26 responses	 MLSC Disbursement Form Dave Pantzer 12 responses
 Legal services - funding priorities beyond your existing grant(s) Dave Pantzer 30 responses	 MLSC Salary & Benefits Survey 2022 Dave Pantzer 34 responses	 MLSC FY24 Grant Orientation meeting availability Dave Pantzer 22 responses	 MLSC Racial Equity VIRTUAL Training: Applying an Equity Alignment Lens (6/13/ Dave Pantzer 47 responses



Draft with Copilot



I need a survey for lawyers who have watched my technology presentation, to see if it met their needs, and where it can be improved.

Please gather their name, affiliation and email address.

Use a 5-point Likert scale to ask them to assess the following questions:

Was the presentation interesting?

Did they find the solutions provided relevant to their work?

Would they recommend the presentation to a colleague?

Use a yes/no format to ask for this feedback:

Did they learn at least one thing they will try out at the office next week?

Finally, set up a free text question to gather any additional feedback.

Thank you!

621 / 2000

Generate



View prompts



Remove the questions you don't want



Lawyer Technology Presentation Survey

Please take a few minutes to complete this survey about the technology presentation you attended. Your feedback is important to us and will help us improve future presentations.



1. Was the presentation interesting?

Strongly
disagree Disagree Neutral Agree Strongly
agree



I found the presentation
to be interesting.

2. Did you find the solutions provided relevant to your work?

Strongly
disagree Disagree N

The solutions provided
were relevant to my work.

3. Would you recommend the presentation to a colleague?

Strongly
disagree Disagree Neutral Agree Strongly
agree



I would recommend the
presentation to a colleague.

4. Did you learn at least one thing you will try out at the office next week?

- Yes
 No



5. Please provide any additional feedback you have about the presentation.

(Enter your answer)



To fine tune the draft, add some details and regenerate

AI-generated content may be incorrect



Add more details for Copilot to fine tune the draft.



5. Please provide any additional feedback you have about the presentation.
(Enter your answer)



6. What is your name?
(Enter your answer)



7. What is your email address?
(Enter your answer)

Lawyer Technology Presentation Survey



Copilot 365 Teams



Copilot
For Microsoft 365

Stay on top

What do I have [Monday at 3 pm]
?

Get calendar info

When's my next meeting with
person ?

Track your tasks

What should be on my radar from
emails last week?

Decode acronyms

What does [LLM] stand for?

Brainstorm

Suggest 10 compelling titles based
on file

Prep for that meeting

Help me prepare for meeting

OK, what can I help with? Try one of the examples or enter your own prompt.

All People Files Meetings Emails

For recaps and action items, recorded meetings work best

MLSC/OAG
Fri 5/31/2024 10:00 AM - 10:30 AM

MLSC - Grants Admin Asst
Fri 5/31/2024 11:00 AM - 11:45 AM

weekly call Carolyn & Reena
Mon 6/3/2024 1:30 PM - 2:30 PM

FY24 MLSC Board Meetings
Mon 6/3/2024 6:00 PM - 8:00 PM

View prompts

Help me prepare for / Start typing to search

Add people, files, and more for better results



Copilot 365 Teams

To prepare for the MLSC/OAG meeting, here are some key points and related content that might be useful:

- The meeting is scheduled for **today at 10:00 AM** and will last until 10:30 AM. It will be a Zoom meeting, and the details for joining have been provided in the invite ¹
- Michelle Siri** and [REDACTED] are among the attendees ¹
- There was a recent email exchange regarding a **prospective grantee** for MLSC, which might be a topic of discussion ²
- There is also a document titled "**23 08.27.21 Access to Counsel Requirements**" that could be relevant to the meeting's agenda ³

It would be beneficial to review these materials and be prepared to discuss the grant under contemplation and any related requirements or updates. If there are specific points or questions you have in mind, it's a good idea to note them down to ensure they are addressed during the meeting. Good luck with your preparation!

AI-generated content may be incorrect

3 References ^



MLSC/OAG

Meeting | 5/31/24 | With Michelle Siri [REDACTED]



RE: Question about MLSC prospective grantee

Outlook | 5/30/24 | Dave Pantzer To [REDACTED] msiri@mlsc.org



23 08.27.21 Access to Counsel Requirements

PDF | Last edited by



1 of 30 responses ●

Copilot 365 Teams

Does MLSC have a COVID policy?

Based on the search results, it appears that the Maryland Legal Services Corporation (MLSC) has implemented policies in response to the COVID-19 pandemic, particularly regarding the signing of affidavits and intake procedures.

- The "MLSC- Internal Control Policy_affidavits signing_FINAL.docx" updated in February 2022, outlines the procedure for signing client eligibility and income affidavits during the pandemic. It mentions that [REDACTED] Legal Services staff members will determine client eligibility at intake and that clients may email signed MLSC forms with an e-signature. [\[1\]](#)
- A Teams message from yesterday afternoon includes a conversation where [REDACTED] suggested adding a COVID policy to the personnel manual, and Michelle Siri asked if MLSC had one in place. You, Dave Pantzer, responded that you've been looking but not finding anything, indicating that there may not be a formal COVID policy document available. [\[2\]](#)
- The "virtual intake policy" document from March 2022 describes a new policy for online and virtual clinics due to COVID-19 limitations. It requires staff to take income information over the phone or virtually for clinics longer than 30 minutes and to document why a client is unable to sign in person. [\[3\]](#)

These documents suggest that MLSC has adapted its procedures to accommodate the challenges posed by the COVID-19 pandemic, although a formal, standalone COVID policy document may not exist. If you need further assistance or specific details from these documents, please let me know.

1 | MLSC- Internal Control Po...

2 | Michelle Siri in chat

3 | virtual intake policy

Copy

● 7 of 30 responses

AI-generated content may be incorrect



Other use cases

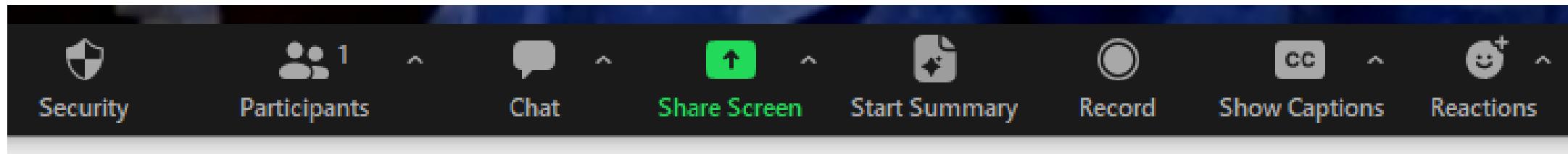
Discussion questions

- Have you used Microsoft CoPilot – found it useful?

2.c. Mainstream tools: Zoom Recording and AI

AI for better meetings

Zoom recording/transcribing/translate features



AI for better meetings

Zoom recording/transcribing/translate features

zoom 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](#)

 45:48

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

Russ bloomquist

Only play highlights

00:05:23 / 00:45:48

Speed CC

Meeting coach

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

Edit Highlights Save highlights

Summary and smart chapters **My meeting coach**

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

From 00:00 AI in Grantee Meetings and...

From 05:14 Playing... Database Credentials...

From 09:05 Chat Bot Costs and Functionality...

From 13:02 Chat Application Features and...

From 16:30 API Key System Implementation...

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 Llm. 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.

Cloud recordings Local recordings

Search by topic or meeting ID

chat gpt

[Advanced search ▾](#)

<input type="checkbox"/> Topic	ID	Start time	File size
<input type="checkbox"/> Maryland Legal Services AI Workgroup	831 2542 4240	May 8, 2024 03:01 PM	4 Files (467 MB)

03:36 and their sort of chat history are looking for, to make images which I thought was kind of peculiar.[View more results](#)

<input type="checkbox"/> Maryland Legal Services AI Workgroup	831 2542 4240	Mar 13, 2024 02:59 PM	4 Files (334 MB)
01:20 I put the link in the chat for the the	View more results		

[!\[\]\(364a81e9b51f2ab84ffae568fe64be34_img.jpg\)](#) [!\[\]\(1c1e4f172b796dfe560bc3d1f547fa69_img.jpg\)](#) 2 result(s)

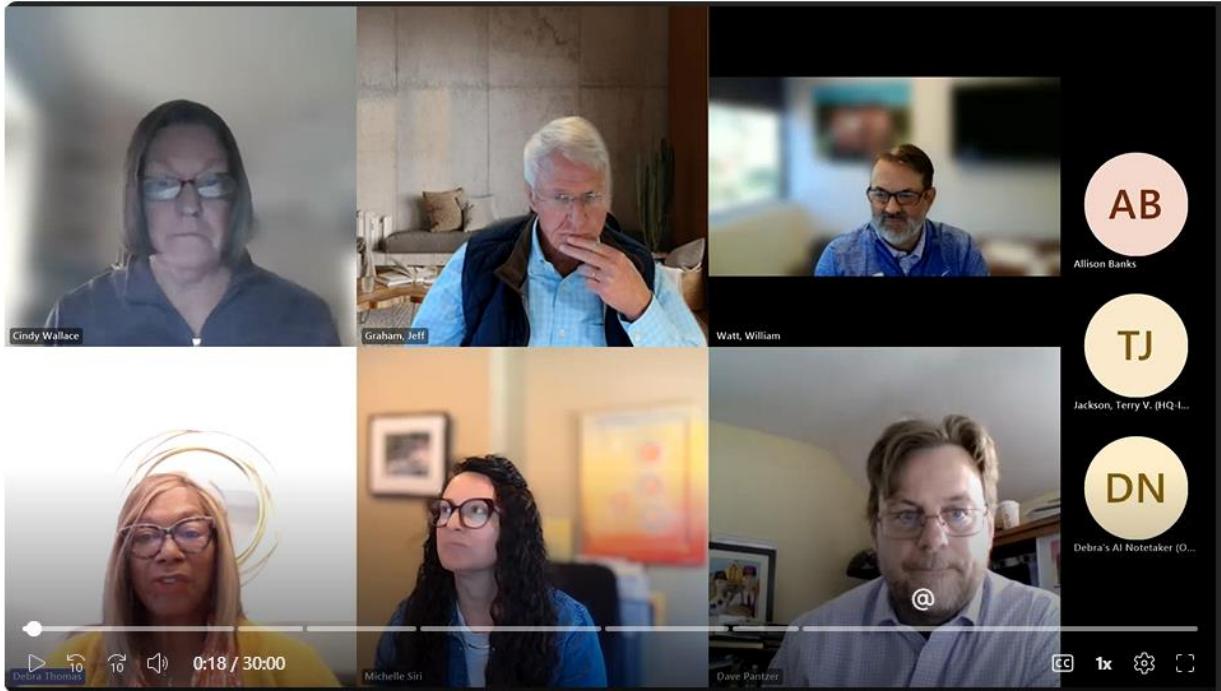
Teams

MLSC Investment Committee Meeting - 10/18/24

Friday, October 18, 2024 12:00 PM - 1:00 PM

... MLSClaw  - X

 Open in Stream  Copilot



Content

No files were shared.

Notes AI notes @ Mentions (1) Transcript

Generated by AI. Be sure to check for accuracy. Copy all

Meeting notes

- Investment Strategy:** Debra, Jeff, and William discussed the current investment strategy, highlighting the importance of a conservative approach and the surprising 9% return. They emphasized the need to be cautious due to market uncertainties and the unique situation.
- Market Conditions:** Jeff provided an overview of the current market conditions, mentioning the high price-earnings ratio, the impact of recent events like the election and geopolitical issues, and the gradual return to more traditional allocation.
- Investment Allocation:** Jeff explained the importance of a gradual approach to investment allocation, suggesting small increases in equity and continuous monitoring of the situation. He highlighted the disparity between different allocation strategies and the need for caution as a nonprofit organization.
- Yield and Fed Rates:** Jeff discussed the yields on short-term investments and the potential impact of the Federal Reserve's decisions on interest rates. He emphasized the importance of monitoring economic indicators and making informed decisions based on the Fed's actions.
- Technical Analysis:** Jeff described the technical analysis process used to determine the relative valuations of ETFs, including moving averages and other indicators. He offered to provide charts to help understand the process and its effectiveness.
- Board Reporting:** Debra and Jeff discussed the need to report to the board, ensuring they have a clear summary of the investment situation. They confirmed the total investment amount and the allocation between reserves and other funds.
- Future Investment Plans:** Debra, Jeff, and William discussed future investment plans, emphasizing the importance of gradually moving back to

2.d. Mainstream tools: OnBoard

The screenshot shows the OnBoard interface. On the left is a dark sidebar with navigation links: Home, Search, Meetings (selected), Notifications, Resources, Actions, Messenger, Directory, Help & Feedback (with a red dot), and a DP button for Dave Pantzer. The main area has a header "Meeting Details" with tabs for Agenda (selected), Annotations, and Invites, and a "Expand All" button. The Agenda section is divided into three sections: I. Introductions, II. Status Review, and III. William [REDACTED] and Jeff [REDACTED] Presentation. Under II. Status Review, there are four items: Baird Stmt [REDACTED] (PDF, Cloud icon), Baird Stmt [REDACTED] (PDF, Cloud icon), MLSC Snapshot... (PDF, Cloud icon), and Quarterly Accou... (PDF, Cloud icon). Under III. William [REDACTED] and Jeff [REDACTED] Presentation, there is one item: [REDACTED] (PDF, Cloud icon). To the right of the agenda is a large preview of a "PREMIER CLIENT STATEMENT ACCOUNT SUMMARY" document from Baird. The document includes sections for "INVESTMENT OBJECTIVE", "ASSET ALLOCATION" (a pie chart showing 65% Bonds, 30% Stocks, 5% Cash and Cash Equivalents), and "YOUR BAIRD FINANCIAL ADVISOR". A red circle highlights the bottom right corner of the document preview, which contains a "My Annotations" button and a checkmark icon.

Can you help me create discussion questions and talking points to facilitate a meeting focused on this documents content?

Discussion Questions

- **Account Summary****
 - How do the year-to-date changes in value affect our overall financial strategy?
 - What actions should we consider based on the asset allocation between taxable bonds and cash equivalents?
- **Income and Distributions****
 - What implications does the income distribution of \$XXX for this period have on our budget?
 - Should we adjust our investment

Other use cases

Discussion questions

3. Next-level projects

- a) Coding with ChatGPT
- b) Retrieval augmented generation
(Paxton.ai)
- c) Local LLMs (GPT4All, short example)
- d) A grantee's story

```
mirror_mod = modifier_obj
# Set mirror object to mirror
mirror_mod.mirror_object

if operation == "MIRROR_X":
    mirror_mod.use_x = True
    mirror_mod.use_y = False
    mirror_mod.use_z = False
elif operation == "MIRROR_Y":
    mirror_mod.use_x = False
    mirror_mod.use_y = True
    mirror_mod.use_z = False
elif operation == "MIRROR_Z":
    mirror_mod.use_x = False
    mirror_mod.use_y = False
    mirror_mod.use_z = True

# Selection at the end - add
# mirror_ob.select= 1
# mirror_ob.select=1
context.scene.objects.active = eval("bpy.context.object")
print("Selected" + str(modifier))
mirror_ob.select = 0
# bpy.context.selected_objects[0].select = 1
data.objects[one.name].select = 1
print("Selected" + str(data.objects[one.name]))
print("please select exactly one object")

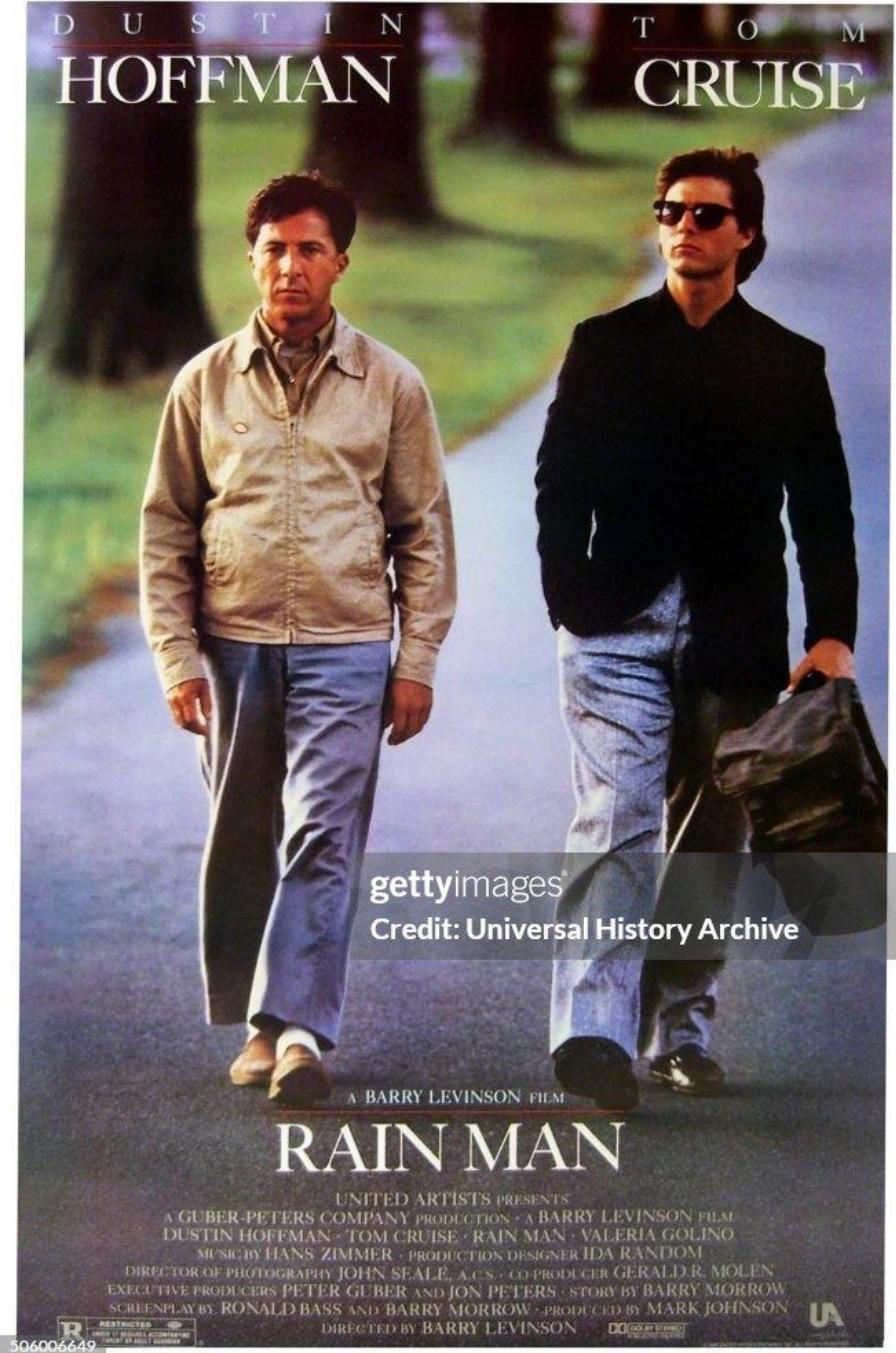
# OPERATOR CLASSES -----
# --- MIRROR OPERATOR ---

@types.Operator:
def execute(self, context):
    # X mirror to the selected object
    context.object.mirror_mirror_x = True
    print("X mirror to the selected object")
    print("mirror X")
    print("mirror modifier X")

    if context.object.mirror_mirror_x:
        print("mirror modifier X is set to True")
    else:
        print("mirror modifier X is set to False")
```

3a: LLM as Assistant

<https://www.gettyimages.com/detail/news-photo/rain-man-starring-dustin-hoffman-and-tom-cruise-a-1988-news-photo/506006649?adppopup=true>



LLM as Assistant



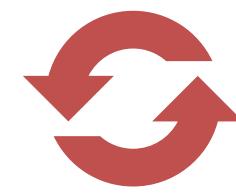
Define the goal



Assess your
starting point



Build solution



Refine

A A A

The People's Law Library of Maryland



English

HOME HOW DO I...? LEGAL SERVICES DIRECTORY LEGAL CLINIC CALENDAR RESEARCH TOPICS ABOUT

Search

Search



HOW DO I...?

- Evaluate My Situation
- Alternatives to Court
- Get Help
- Legal Research
- Start/Respond to a Case
- Discovery and Evidence
- Prepare for Court
- Judgments
- Appeals

RESEARCH TOPICS

HOW DO I...?

Evaluate My Situation, Alternatives to Court, Get Help, Legal Research, Start/Respond to a Case, More...

CONSUMER

Automobiles, Bankruptcy, Contracts, Credit: Debts & Loans, Identity Theft, More...

CRIMINAL

Expungement, Victim's Rights, More...

DOMESTIC VIOLENCE

Protective Orders and Peace Orders, Legal Options, Non-Legal Support, Safety Issues, More...

EDUCATION

Discipline, Enrollment & Registration, More...

EMPLOYMENT

Discrimination, Unemployment Benefits, Youth Employment, More...

LEGAL SERVICES DIRECTORY

Enter your county and the type of service you need. Or
[CLICK HERE](#) to see all providers in the directory.

Keyword County Category
 - Any - - Any -

[FIND A SERVICE PROVIDER](#)

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Free legal help with your civil matter.
8:30 am - 8:00 pm, Mon - Fri



410-260-1392

LEGAL CLINIC CALENDAR

Find a free upcoming clinic near you

[UPCOMING EVENTS](#)

ASK A MARYLAND LAW LIBRARIAN

Submit a legal information question to the Thurgood Marshall State Law Library

[CLICK HERE](#)

Background

Research Topics

HOW DO I...?

CONSUMER

CRIMINAL

DOMESTIC VIOLENCE

EDUCATION

EMPLOYMENT

FAMILY LAW

GOVERNMENT BENEFITS & SERVICES

LANDLORD - TENANT

LIFE AND HEALTH PLANNING

OTHER LEGAL ISSUES

REAL ESTATE AND OTHER HOUSING

WILLS - ESTATES - PROBATE

YOUTH LAW

Background

Tenant's Right to Stay on Property by Paying Amounts Owed

In any summary ejectment (eviction) for failure to pay rent where the landlord is awarded a judgment for the leased premises, the tenant has the right to remain in the leased premises by giving cash, a certified check, or his agent to cover all past due rent and late fees, plus court-awarded costs and fees at any time before the entry of the order. This is called the "right of redemption."

However, the tenant's right of redemption (i.e. right to stop the eviction) is not available if 3 (4 in Baltimore City) notices of possession for rent due and unpaid were entered against the tenant in the 12 months prior to the beginning of the action.

A landlord may not refuse payment from a rental assistance program managed or funded by a county or city.

Read the Law: [Md. Code, Real Property § 8-401\(g\)](#)

Background



DALL-E



A screenshot of a presentation slide. At the top, there is a navigation bar with a red box highlighting the page number '1 / 442'. To the right of the page number are icons for zooming in and out, and a refresh symbol. The main content area has a teal background. On the left, the title 'THE 90 DAY REPORT' is displayed in large, white, sans-serif capital letters. Below the title, a subtitle reads 'A Review of the 2024 Legislative Session'. On the right side of the slide, there is a photograph of a classical building with white columns and a pediment.

The manual review process

1. Flip through the 90 day report until something looks relevant
2. Go read the bill (or the summary)
3. Go find the PLL article that's related
4. See if there are statutory citations
5. See if anything else needs to change

LLM as Assistant – Background

How can I
use an LLM
to speed up
this work?



DALL-E

LLM as Assistant

- Goal: Write a simple computer program to automate citation checking
 - Scrape PLL citations and put into spreadsheet
 - Scrape MGA citations and put into spreadsheet
 - Compare spreadsheets for overlap

Charts

Senate



Status

Approved by the Governor - Chapter 537

Title

Electricity and Gas - Retail Supply - Regulation and Consumer Protection

Statutes

[Article - Public Utilities](#)

([1-101](#), [13-101](#), [13-201](#), [7-310](#),
[7-507](#), [7-507.1](#), [7-510](#), [7-602](#),
[7-603](#), [7-603.1](#), [7-604](#), [7-605](#), [7-705](#), [7-707](#))

LLM as Assistant – Assessing

Tenant's Right to Stay on Property by Paying Amounts Owed

In any summary ejectment (eviction) for failure to pay rent where the landlord is awarded a judgment for the unpaid rent and fees, the tenant has the right to remain in the leased premises by giving cash, a certified check, or his agent to cover all past due rent and late fees, plus court-awarded costs and fees at any time before the entry of the final judgment and before the entry of the writ of possession. This is called the "right of redemption."

However, the tenant's right of redemption (i.e. right to stop the eviction) is not available if 3 (4 in Baltimore City) judgments for possession for rent due and unpaid were entered against the tenant in the 12 months prior to the beginning of the action.

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Read the Law: [Md. Code, Real Property § 8-401\(g\)](#)

LLM as Assistant – Assessing



DALL-E

LLM as Assistant – Building

i need to write a program that analyzes data on a website. I need the program to look at a page like this:

<https://mgaleg.maryland.gov/mgawebsite/Legislation/Details/HB0001>

and check the status. If the status is "approved by the governor" the program needs to extract the data under "statutes" and output the data into a csv. do you know how i can do that?



Yes, I can help you with that! You can achieve this by using `Python` with libraries such as `requests` for fetching the webpage, `BeautifulSoup` for parsing the HTML, and `csv` for writing to a CSV file.

LLM as Assistant – Building

python

 Copy code

```
import requests
from bs4 import BeautifulSoup
import csv

# Define the URL of the webpage
url = "https://mgaleg.maryland.gov/mgawebsite/Legislation/Details/HB0001"

# Send a GET request to the webpage
response = requests.get(url)
if response.status_code == 200:
    # Parse the HTML content of the page
    soup = BeautifulSoup(response.content, 'html.parser')
```

LLM as Assistant – Building

Explanation

1. **Requests:** The `requests` library is used to fetch the content of the webpage.
2. **BeautifulSoup:** The `BeautifulSoup` library parses the HTML content.
3. **Status Check:** The script checks if the status of the legislation is "Approved by the Governor".
4. **Extract Statutes:** If the status is approved, it extracts the data under the "statutes" section.
5. **Write to CSV:** The extracted data is written to a CSV file named `statutes_data.csv` .

LLM as Assistant Teacher



Python is a popular programming language known for its simplicity and readability, making it a great choice for beginners and experienced developers alike. It is widely used for web development, data analysis, artificial intelligence, scientific computing, and many other applications.

Key Features of Python

1. **Readability:** Python code is designed to be readable and easy to understand, with a syntax that emphasizes clarity.
2. **Versatility:** Python can be used for a variety of tasks, from web development to data analysis to scripting.
3. **Libraries and Frameworks:** Python has a rich ecosystem of libraries and frameworks that make it easier to perform complex tasks.
4. **Community:** Python has a large and active community, which means plenty of resources, tutorials, and support are available.

To be honest I have no idea what you are talking about. What is Python?

LLM as Assistant - Refine

Bill Number	Bill Name	URL	Article	Sections	Effective Date
HB0253	Cannabis Reform - Alterations	https://mgaleg.maryland.gov/legislation/Detail/s/HB0253	Article - Alcoholic Beverages and Cannabis	(1-101, 1-202, 1-303, 1-308, 1-309.1, 1-309.2, 1-322, 36-101, 36-1102, 36-202, 36-206, 36-302, 36-401, 36-402, 36-404, 36-407, 36-409, 36-501, 36-505, 36-903)	Upon Enactment

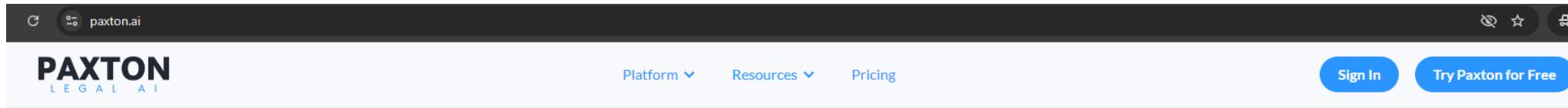
LLM as Assistant - Refine

- Is an LLM reliable for coding?
 - Yes!
 - Can immediately test the results!

https://en.wikipedia.org/wiki/Kim_Peek#/media/File:Kim_Peek_on_Jan_16,_2007.png



3b: retrieval augmented generation

A screenshot of the Paxton Legal AI website. The header features a dark navigation bar with the URL 'paxton.ai' in the address bar, the 'PAXTON LEGAL AI' logo, and links for 'Platform', 'Resources', and 'Pricing'. On the right are 'Sign In' and 'Try Paxton for Free' buttons. Below the header, the main title 'Explore Paxton's Advanced Features' is displayed in large blue text, followed by six feature cards arranged in two rows of three.

Explore Paxton's Advanced Features



Comprehensive Legal Research

Paxton offers real-time legal updates, scanning millions of sources daily to provide comprehensive coverage of US laws and court rulings.



High-Volume Document Analysis

Effortlessly manage high volumes of documents with our robust analysis tool. Simply upload or point to your files to analyze, summarize, and query in seconds.



Enterprise-Grade Security

Paxton AI prioritizes security, having achieved SOC 2 compliance and adhering to ISO standards to ensure the utmost data protection and integrity for every client interaction.



Boolean Query Builder

Craft precise searches effortlessly with our Boolean Composer, enabling targeted queries through simple, intuitive inputs for faster, more accurate legal research outcomes.



Expert Level Drafting

Paxton AI, trained on billions of legal documents, and is able to draft like a seasoned attorney, embodying precision and depth.



Intelligent Contract Analysis

Utilize intuitive Generative AI to speed up contract review, highlighting key clauses and potential risks, allowing teams to accurately review documents faster than ever before.

Paxton.ai



leland.sampson@mdcour

Drafting & Analysis

- AI Chat & Drafting
- File Analysis

Research

- Combined Research beta
- Laws & Regulations
- Case Law

Drive

- My Drive

Tools

[Share Paxton](#)

Paxton provides self-help services at your specific direction. We are not a law firm or a substitute for an attorney or law firm. Communications between you and Paxton are protected by our [Privacy Policy](#), but not by the attorney-client privilege or as work product. We cannot provide any kind of advice, explanation, opinion, or recommendation about possible legal rights, remedies, defenses, options, selection of forms, or strategies. Your access to our website is subject to our [Terms of Service](#).

New chat

New chat

New chat

Last 7 days

- Employee grievance process req
- Getting Health Insurance Witho
- Unemployment for Laid Off Em
- Maryland unemployment benef
- Maryland District Court Docum

Oct, 2024

- Student Suspension for Off-Car
- Suing for Spousal Support
- Cousin's theft from bank accou

[Select source](#)

Source is required

Enter a prompt here



new line: shift + enter

How can I help?

Federal Authority

Conduct research on federal statutory and regulatory authority.

Laws and Regulations Across All 50 States

What is the statute of limitation for a breach of contract claim in Kansas?

Code of Federal Regulations

What are the relevant regulatory rules I should be aware of for my fintech startup?

Civil Procedure

What is the deadline to respond to a discovery request in Texas?

Paxton.ai - legal research

Section 10.26.03.03 - Standards of Practice, Md. Code Regs. 10.26.03.03

You

Do a
conce

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Select source 

Source: Maryland

Do acupunct
any rules of

Par

A. The licensee shall be concerned primarily with the welfare of the patient or client.

B. A licensee who suffers from a physical, mental, or emotional impairment, including chemical abuse, which impacts the licensee's ability to practice acupuncture shall seek professional treatment and refrain from the practice of acupuncture until such time as the impairment no longer exists or reasonable accommodations can be made.

C. A licensee shall:

(1) Use professional discretion and integrity in relationships with a member of the health care community;

(2) Be professional in conduct, with honesty, integrity, self-respect, and fairness;

(3) Remain free from a conflict of interest while fulfilling the objectives and maintaining the integrity of the acupuncture profession;

(4) Provide accurate fee information to the patient, the individual responsible for payment for treatment, and the insurer;

2 ci

[10 Sec

[11 Sec



Paxton.ai - legal research

You

I am looking for a case that summarizes the elements of a medical malpractice tort

Paxton

In the context of medical malpractice torts, the elements that must be established to prove a case are well-documented across various jurisdictions. A pivotal case that summarizes these elements is **Weimer v. Hetrick**, where the court outlined that a *prima facie* case of medical malpractice must consist of evidence that (1) establishes the applicable standard of care, (2) demonstrates that this standard has been violated, and (3) develops a causal relationship between the violation and the harm complained of [8]. This framework is critical in understanding the foundational requirements for pursuing a medical malpractice claim.

Paxton.ai - drafting

Paxton

Based on the complaint for divorce filed in the Circuit Court for Montgomery County, Maryland, involving Emily Smith (Plaintiff) and John Smith (Defendant), with the key issues being the primary custody of their two children, Oliver and Mia, and the agreement on the division of property, here is a set of 30 interrogatories tailored to gather necessary information for the case:

1. Please state your full name, current residential address, and date of birth.
2. State your current employment status, including the name and address of your employer, your job title, and your annual income.
3. Describe your educational background, including the names of institutions attended and degrees obtained.
4. Provide the date of your marriage to Emily Smith and the location of the marriage ceremony.
5. Detail the date you and Emily Smith began living separate and apart, and the reasons for the separation.
6. Describe any attempts at reconciliation between you and Emily Smith, including dates and outcomes of such attempts.
7. List any previous legal proceedings between you and Emily Smith, including the nature of the proceedings, the court in which they were filed, and the outcomes.
8. Describe the current living arrangements for Oliver and Mia, including who they primarily reside with and the address of the residence.
9. Detail your proposed custody arrangement for Oliver and Mia, including the rationale behind your proposal.
10. Describe Emily Smith's proposed custody arrangement for Oliver and Mia, to the best of your knowledge.

Drafting

Type of document

Contract, will, legal notice

complaint for absolute divorce

Relevant parties

Names of individuals, companies involved

plaintiff: emily smith, defendant: john smith, chil

Key details

Specific terms, conditions, clauses, or stipulations you want to include

Both John and Emily are seeking primary custody of Oliver and Mia

The parties agree as to the division of property

Jurisdiction

The legal jurisdiction or country laws the document should comply with

Maryland

Additional preferences

Style, format or specific legal language requirements

Done



Create

Configure



Name

Legal Eagle

Description

Specializes in policy and legal documents.

Instructions

Legal Eagle specializes in providing in-depth answers to questions about the rules for a grantmaking program, drawing directly from and expanding upon the documents provided. It delivers detailed responses, including citations and justifications from the rules within these documents, using a conversational tone to make the information accessible and engaging. Legal Eagle aims to offer comprehensive insights, ensuring users have a thorough understanding of the subject matter. It emphasizes clarity, precision, and relevance in its explanations, incorporating direct references to the

Conversation starters

What does this policy mean? ×

How does this law apply to my situation? ×

Can you explain this legal term? ×

What are the implications of this policy? ×

Knowledge

If you upload files under Knowledge, conversations with your GPT may include file contents. Files will be downloaded when Code Interpreter is enabled



23 08.27.21 Access to Cou...
PDF



AG Scan_Combined.pdf
PDF



7_6.8.1990 - Eligibility, H...
PDF



MLSC Act.docx
Document



MLSC Glossary - Jan 2024...
PDF

Upload files

Capabilities

Web Browsing

DALL-E Image Generation

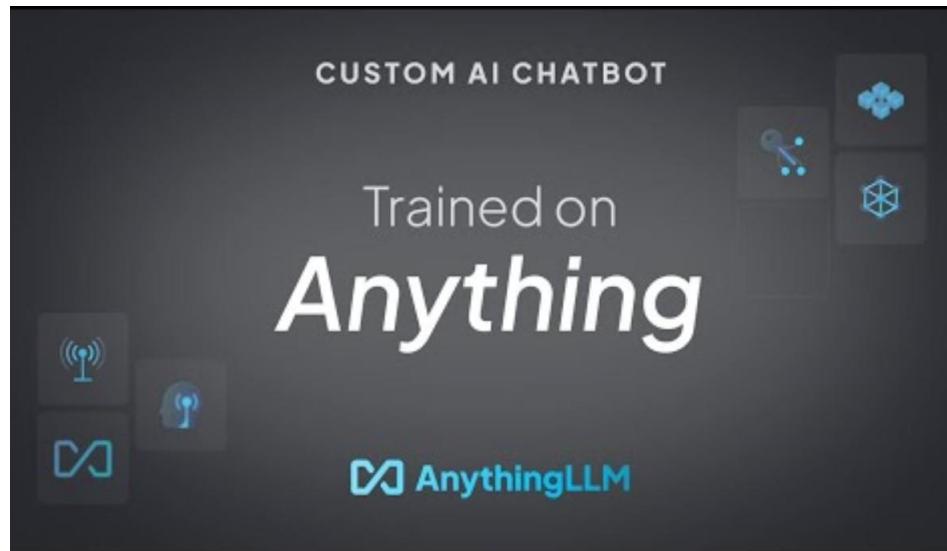
Code Interpreter ?

Actions

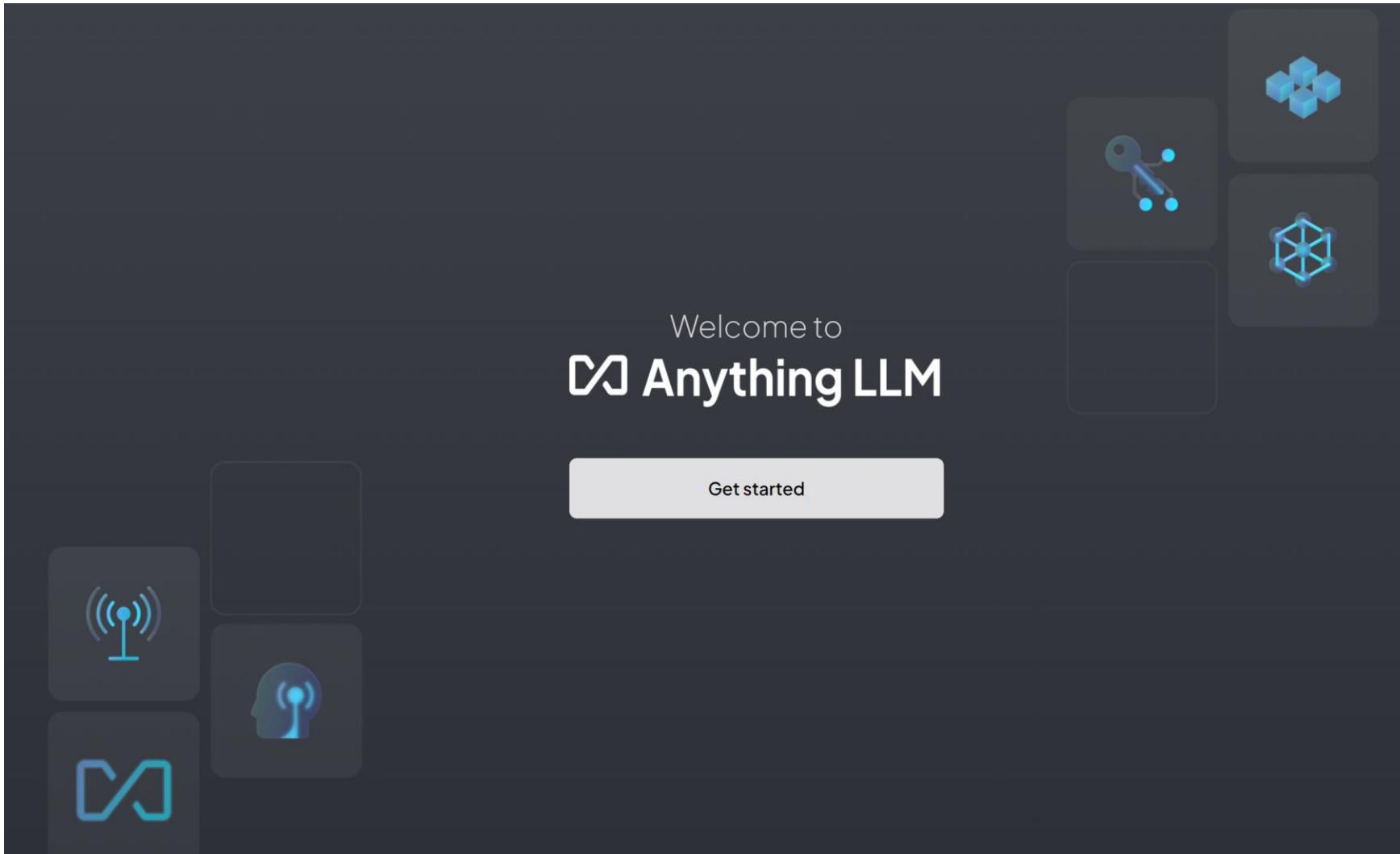
Create new action

3c: local LLMs

Anything LLM



Anything LLM



Anything LLM

LLM Preference

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

Search LLM providers

The standard option for most non-commercial use.

Azure OpenAI
The enterprise option of OpenAI hosted on Azure services.

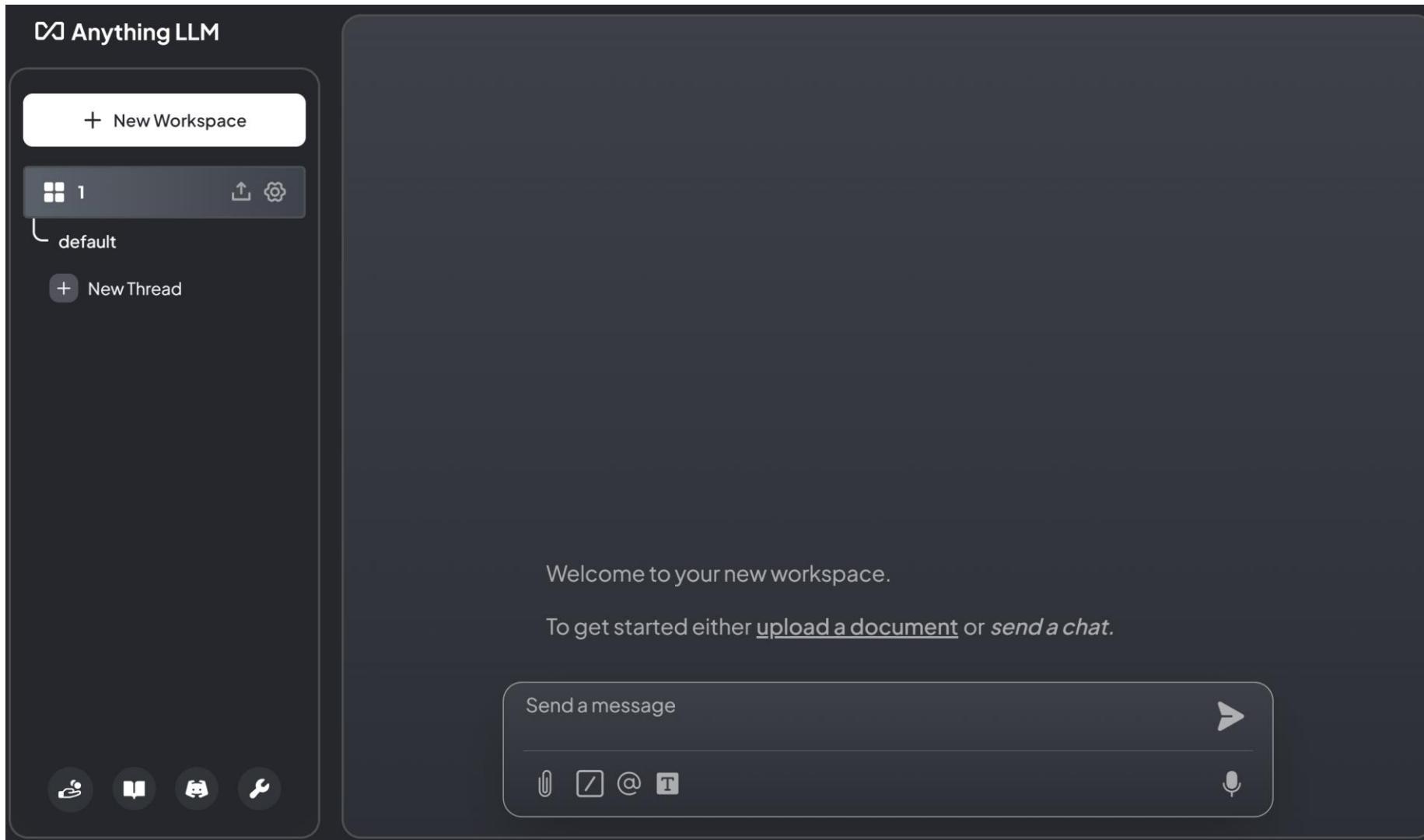
Anthropic
A friendly AI Assistant hosted by Anthropic.

Gemini
Google's largest and most capable AI model

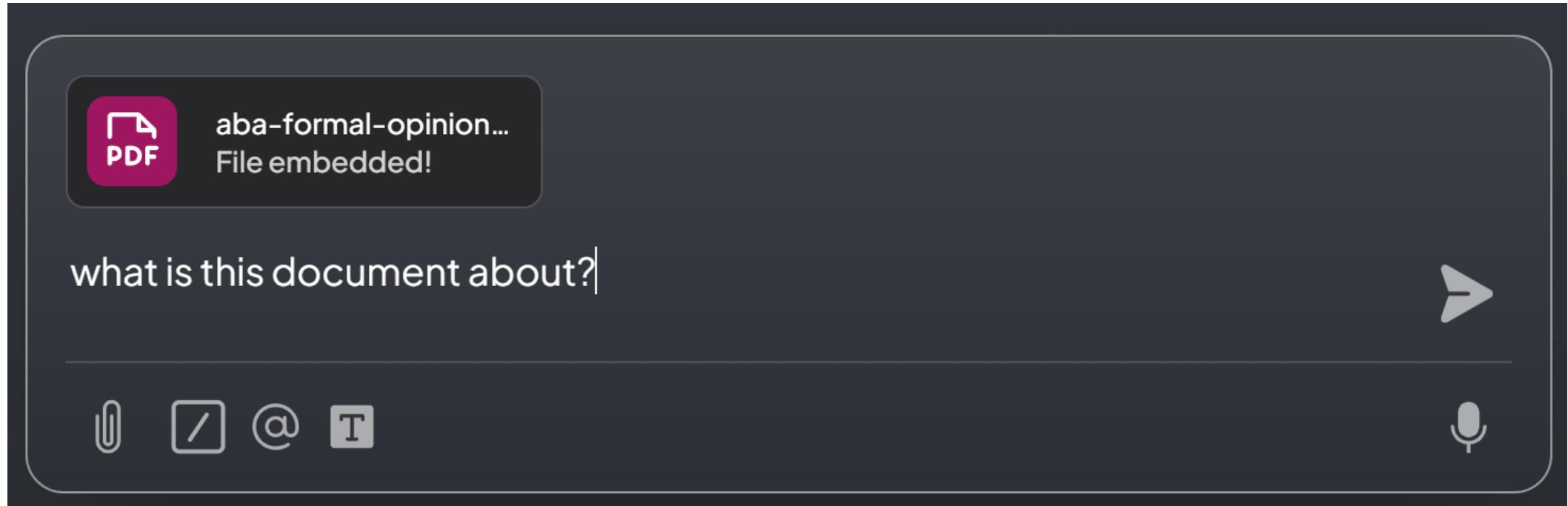
HuggingFace
Access 150,000+ open-source LLMs and the world's AI community

Ollama
Run LLMs locally on your own machine.

Anything LLM



Anything LLM



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
ⓘ 42% match

A series of horizontal gray bars of varying lengths, suggesting redacted text or code. They are positioned below the numbered footnotes and above the footer area.

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
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29
ⓘ 42% match

A series of horizontal gray bars of varying lengths, suggesting redacted text or code. They are positioned below the numbered footnotes and above the footer area.

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 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

Anything LLM Alternative: Google NotebookLM

NotebookLM

Sources

- Select all sources
- Getting Started with ...
- Getting The Most Out...
- NotebookLM Features
- NotebookLM Glossary
- NotebookLM Troubles...
- Using NotebookLM As...
- Using NotebookLM Fo...
- Using NotebookLM wi...

Introduction to NotebookLM

Add note ✓ Select all

Written Note

About this notebook

This notebook is designed to help you learn about NotebookLM's features while actually using the product. Start by clicking on this note to read it in its entirety. NotebookLM lets you read, take notes, ask questions, organize your ideas, and much more -- all with the power of Google AI helping you at every step of the way.

On the left you can see a list of "sources" that are included with this notebook. In this case,

Written Note

Why can't I write a note?

This is a view-only public notebook, so you are limited to reading the sources and asking questions. You also can't create Notebook Guides like "Briefing Doc" or "FAQ." When you create your own notebook, you'll be able to do much more: upload your own sources, write notes, and use the AI to transform your notes or sources by turning them into outlines, study guides, and much more.

What are the different types of sources that can be uploaded into NotebookLM? [Discuss the capabilities >](#)

View Chat 8 sources Start typing... * Notebook guide

NotebookLM may still sometimes give inaccurate responses, so you may want to confirm any facts independently.

3d: A Grantee's Story



A screenshot of the mlaGPT AI tool interface. At the top, it says "Welcome to mlaGPT, Russ (mdlab)! How can I assist you today?". Below that, it says "Select from the options below to get started." There are four main buttons: "Chat" (blue speech bubble icon), "Upload" (green cloud icon), "Browse" (yellow globe icon), and "YouTube" (red play button icon). In the bottom left corner, there is a dropdown menu with the following options: "Convert to Passive Voice" (highlighted with a green underline), "Convert to Active Voice" (with a cursor pointing at it), "Rewrite in Persuasive Style", "Add More Detail", "Browse Website", and "YouTube Link". The main text area shows a sentence being processed: "I French. more professional." A small note at the bottom says "Inaccuracy, users are responsible for fact-checking generated content." A "How can I assist you today?" button is at the bottom left.

MLAGPT: This generative AI tool can be used for a wide range of content drafting, summarization, and task automation. The system can work with PDFs, Word documents, website URLs, YouTube videos, and can process a variety of audio and video files. MLA has a zero-data retention agreement with OpenAI, making our AI system HIPAA compliant.

Zero Data Retention Information <https://community.openai.com/t/zero-data-retention-information/702540>

Summarize the provided board meeting transcript. Format the text as a concise narrative of events, ensuring logical breaks by speaker. Organize the text into sections with appropriate headers such as WELCOME, APPROVAL OF MINUTES, MISSION MOMENT, CLIENTS' SECTION, PRESIDENT'S REPORT, EXECUTIVE DIRECTOR'S REPORT, FINANCE COMMITTEE, ANNOUNCEMENT & ADJOURNMENT. If a section is not explicitly mentioned, it should be treated as a continuation of the previous section without a new header and include identifiers like (Speaker #) or (Attachment #) next to the relevant headers when applicable. Each section should appear only once and typically in the specified order.

3d: A Grantee's Story

In the works:

- **Integration with Court Form Generator**
- **Opening this program to other organizations**
- **Local desktop version**
- **Appeal drafting tool**
- **Connect to case management database**



3d: A Grantee's Story



“ *When you're already good at something, and you're knowledgeable in a particular field, this is when AI helps you shine.*

Augmenting your existing abilities with it is the best way to go. Don't try to do something that you don't know how to do already with it.

”

--Russ Bloomquist, MLA

4. Moving toward better data collection



Row-level case data collection

Why are we bothering with this?

- To preserve information lost due to aggregation

Why do we need this detailed information?

- To support MLSC's mission of ensuring low-income Marylanders have access to stable, efficient, and effective civil legal assistance, by clarifying services available across jurisdictions and identifying service “deserts” in which certain services are not readily available.
- To help MLSC to advocate for additional funding.
- To provide the MLSC board with insights needed to make funding decisions that will optimize service growth by type and location.

Row-level case data collection

What are grantee organizations required to do?

- Provide closed case data in a row of a spreadsheet (csv or excel)

How is MLSC helping grantees to achieve this goal?

- Optional participation in pilot phases (includes MLSC tech partner)
- One-time technology grants to assist with time/effort and purchases needed to comply with new reporting requirements

Have there been sticking points so far?

- Grantee concerns with PII (Personal Identifiable Information) regarding specific case types
- In the process of identifying the best data validation and mapping tools.

Tableau Data Visualizations

- Change filters
- Multiple download options

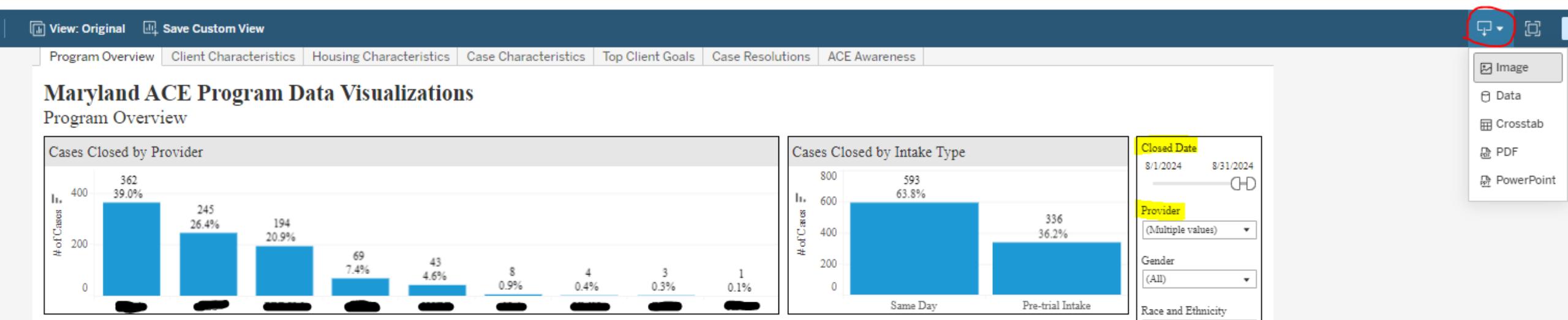


Tableau Data Visualizations: Export to PDF

Download PDF X

Include ▼

This View

Specific sheets from this dashboard

Specific sheets from this workbook

Page Size Letter Orientation Portrait

Download

Download PDF X

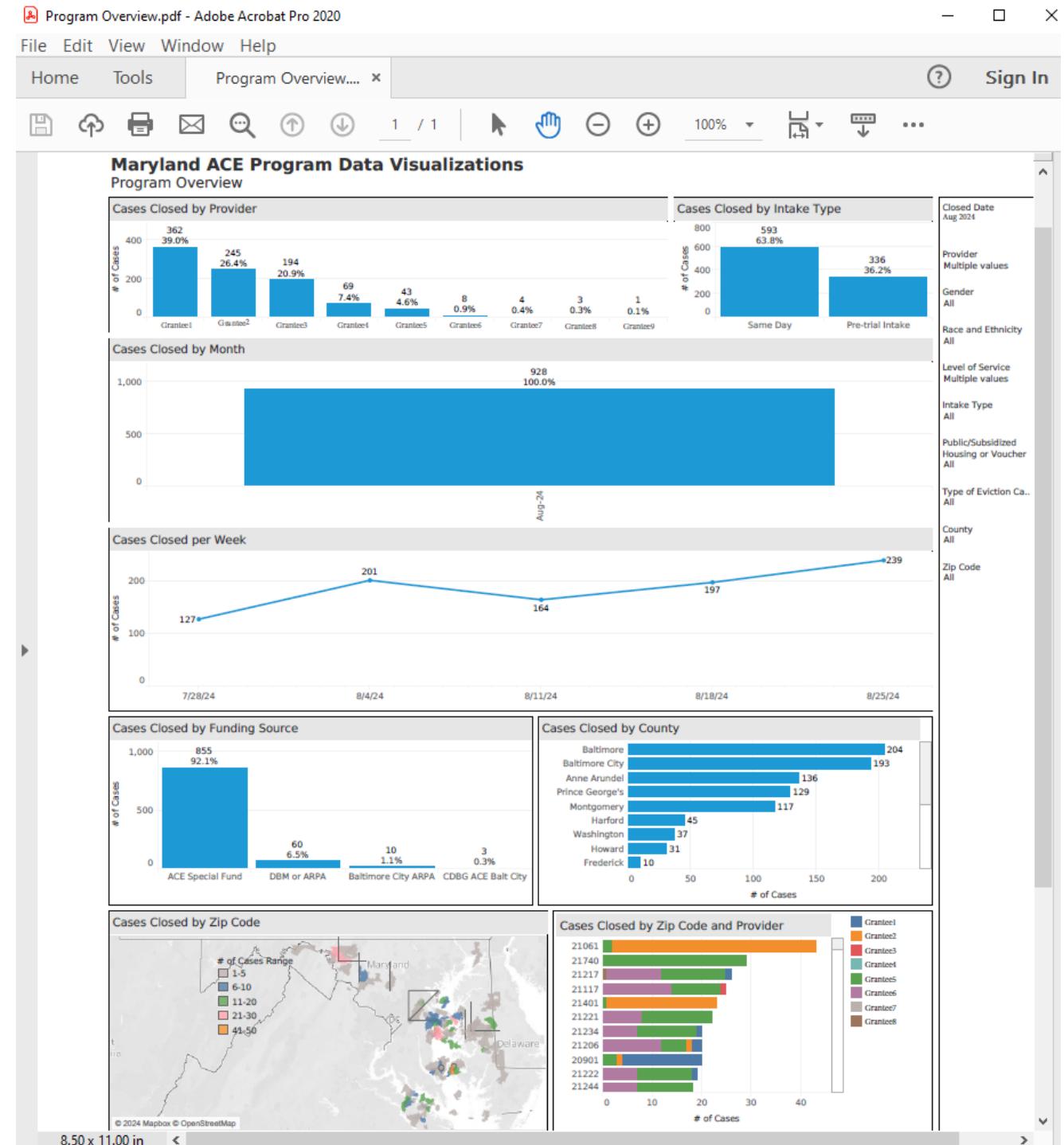
Include ▼

Specific sheets from this dashboard

level of service

case handler

1 of 7 Select All Clear All



Data Integrity Summary

Data Integrity Detail by Provider & Case

Data Integrity Summary | Case Data Integrity Issues

Maryland ACE Program Data Integrity Dashboard

Closed Date Total # of Data Quality Issues Provider Month, Year of Closed Date

8/1/2024 8/31/2024 (All) (All) (All)

Cases with Multiple Data Quality Issues Identified

Provider	Case Number	Case ID Issue	County Issue	Age Issue	Gender Issue	Race/Ethnicity Issue	Intake Type Issue	Funding Source Issue	Provider Type Issue	Type of Case Issue	Level of Service Issue	Level of Service Other Appropriate Remedies Issue	Level of Service Other Services Provided Issue	Case Resolution Issue	Case Resolution Other Benefit Issue
	403527														Mismatch with level of service
	407740														Mismatch with level of service
	50975														Missing
	51392														Missing
	51597														Missing
	51680														Missing
	51876														Missing
	51621														Mismatch with level of service
	51622														Mismatch with level of service
	None			Missing	Missing	Missing		Missing	Missing	Missing	Missing				Missing
	23-0539129														Mismatch with level of service

Other topics

- Setting grantee expectations for use of their data (public chatbots)
- PodSnacks
- Zero data retention
- Microsoft abuse monitoring: <https://learn.microsoft.com/en-us/azure/ai-services/openai/concepts/abuse-monitoring>
- Content about the pre-processing text in various chatbots
- ChatGPT app

PodSnacks



The AI in Business Podcast

Long-Term ROI on GenAI in Healthcare



Summary:

The Rise of Generative AI and LLMs in Healthcare
made in generative AI tools and large language models (LLMs) and the challenges and opportunities they pose for healthcare organizations.

Shift from Experimentation to Delivery
high degree of ROI from investments in LLMs. It emphasizes the shift from experimentation and exploration to delivery and scaling.

The Need for Cultural Change and Business Transformation
generative AI requires not just the right technology, but also a cultural shift within organizations. Businesses need to rethink and redesign their processes to fully capitalize on the capabilities of these emerging tools.

Chapters:

Chapter 1: The Evolving AI Landscape in Healthcare (0:58 - 3:06)

This chapter discusses the rapid advancements in generative AI tools, such as ChatGPT, and how they have transformed the AI landscape in the past two years. The conversation explores the shift in focus from experimentation to achieving tangible ROI, as businesses grapple with integrating these new technologies into their operations.

Chapter 2: Navigating the Challenges of Adopting LLMs (3:06 - 6:09)

This chapter delves into the challenges healthcare organizations face in adopting large language models (LLMs) and generative AI tools. It highlights the need for a cultural shift, as these technologies require changes to existing business processes and workflows. The discussion also touches on the importance of balancing short-term expectations with long-term benefits.

Chapter 3: Driving Value with Responsible AI Adoption (6:09 - 10:34)

This chapter explores strategies for business leaders to effectively leverage LLMs and generative AI tools. It emphasizes the importance of hands-on experience and responsible use, rather than relying solely on the technology's capabilities. The discussion also touches on the competitive advantages that can be gained by proactive adoption of these technologies.