Civil Legal Aid Project Demos & Showcase

AI & A2J Summit: Learning and Innovating Together

September 17, 2026

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Three Real Examples of Using AI in Practice

AI as Editor

Lindsay Bramble
Deputy Director for Remote Services
Maryland Center for Legal Assistance

AI Taking on the Tedious Work

Heather Gardner
Founder & CEO
Propel Paralegal

AI Helping me Build Something

Donald Tobin
Gordon, Wolf & Carney Professor of Law
University of Maryland Francis King Carey School of Law

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AI as Editor

How I rewrote our third-party confidentiality waiver with ChatGPT.

Lindsay Bramble
Deputy Director for Remote Services
Maryland Center for Legal Assistance

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The Goals

1

Simplify It

Rewrite the waiver in plain language that is easier for self-represented litigants to understand.

2

Find the Gaps

Look at the document with fresh “eyes” and identify gaps, unclear concepts, or issues we may have overlooked.

3

Think It Through

Use AI to brainstorm options, work through questions, and challenge our initial approach.

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Why We Used AI

Too Close to the Work

We know the document and the law so well that language that may be confusing to someone else can feel perfectly clear to us.

Stuck in the Existing Language

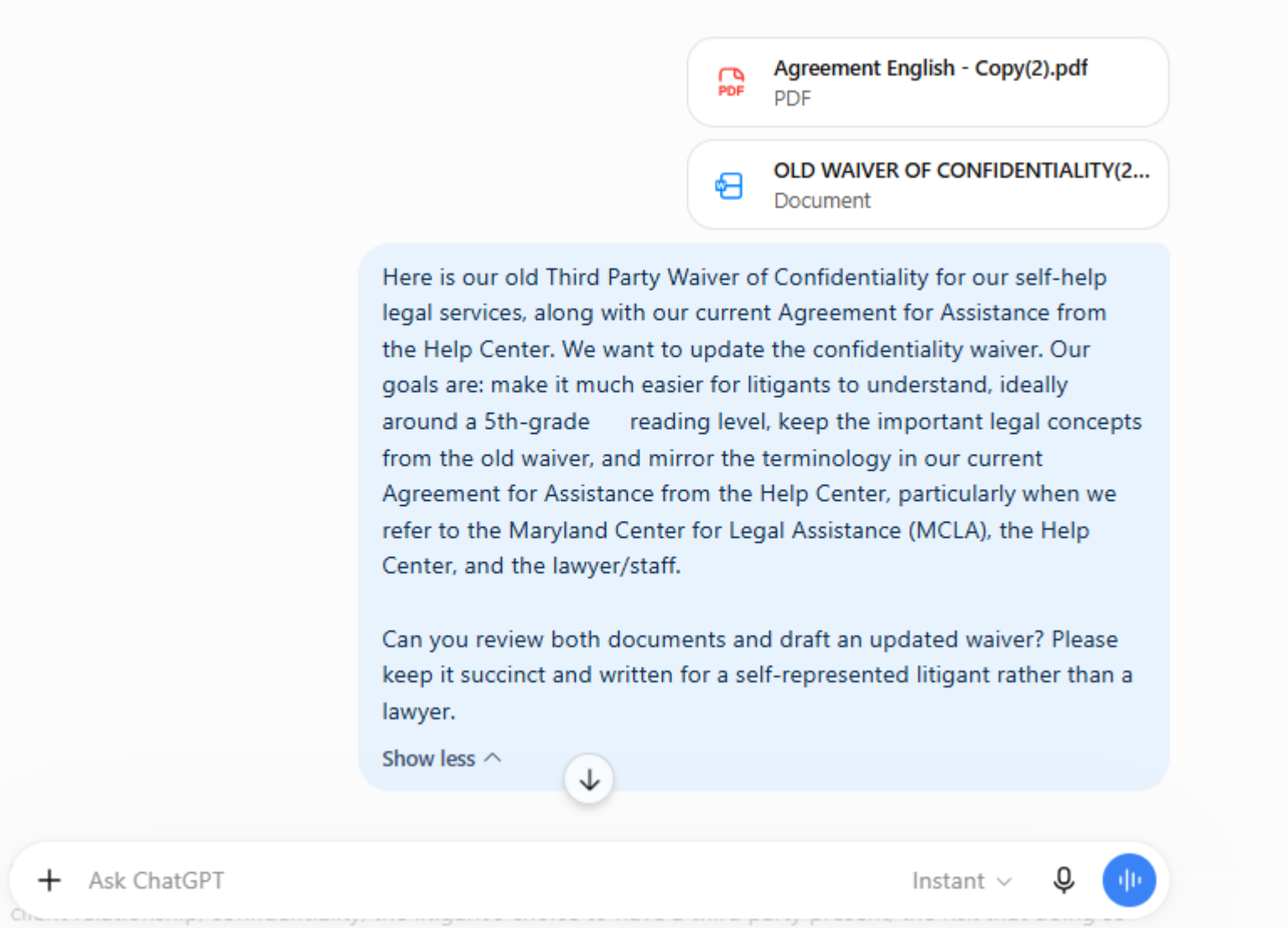
Once the words are already on the page, it's hard to imagine a completely different way to say the same thing. AI can generate alternatives without being anchored to the original wording.

A Different Perspective

We naturally review a document from our own perspective. AI can be asked to look at it through someone else's eyes, helping identify questions, confusion, or gaps we may not see.

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My First Prompt to chatGPT + Supporting Documents



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ChatGPT's First Response: Hits and Misses

What it got right

- Successfully translated complex legal jargon into understandable terms, targeting a 5th-grade reading level.
- Identified discrepancies between the waiver and the sign-in agreement, and actively reconciled inconsistencies.
- Achieved the primary goal of making the document accessible to self-represented litigants.

Initial Missteps & Refinements

- It wrote part of the agreement as if this was a traditional lawyer-client representation relationship, rather than a brief-advice limited scope service
- I sent another prompt explaining that *MCLA provides the attorneys who work at the Help Center and that during the consultation, the specific attorney and the litigant have an attorney-client relationship* and asked it to correct that in its draft
- I further requested it to *track changes in subsequent revisions to easily visualize all modifications.*

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ChatGPT's Second Response with Tracked Changes

ChatGPT successfully incorporated the feedback and produced a revised waiver, complete with clear track changes, addressing the areas I had asked it to in my second prompt.

Waiver of Confidentiality

I, _____, am asking for legal help from the Maryland Court Help Center.

Litigant Name

- I understand that ~~the Maryland Center for Legal Assistance (MCLA) provides the lawyers who work at the Help Center.~~ **I will meet with a lawyer from the Maryland Center for Legal Assistance (MCLA).**
- I understand that ~~MCLA is my lawyer for this meeting and that what I say during my meeting is private~~ **what I tell the lawyer is private** and protected by attorney-client confidentiality.
- I understand that I do not have to have another person with me during my meeting.
- I want the following person to be with me during my meeting with the lawyer:

Third Party Name

- I understand that having another person in the meeting may mean that my private conversation with my lawyer does not stay private.
- I understand that the lawyer or the other person may have to tell others what I said. For example, they could be required by law to testify in court.
- I choose to have this person attend my meeting even though doing so may affect attorney-client confidentiality.
- I understand that everything in the Agreement for Assistance from the Help Center is ~~also~~ part of this Waiver of Confidentiality.
- I have read this form, understand it, and sign it voluntarily.

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Examples from the Revision

These are actual language changes that came out of the conversation with chatGPT:

Original Language	Plain Language Revision by chatGPT
"seeking services"	"asking for legal help"
"all communications between me and the attorney are confidential and protected from disclosure to third parties"	"what I tell the lawyer is private and protected"
"I am not required to have a third party present during my consultation"	"I do not have to have another person with me during my meeting"
"the third party may disclose information to others about what is discussed during my consultation"	"having another person in the meeting may mean that my private conversation does not stay private"

Human Review was necessary to ensure that removing “legal jargon” didn’t change the meaning.

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“Chat, I forgot something!”

- During our internal review, we realized our practice was inconsistent: some attorneys also had third parties sign the waiver, while others did not.
- Rather than just asking AI to “add a third-party signature line,” I asked for ideas about *how best to incorporate the third party into the form*

I like the idea of a separate “Acknowledgment by Third Party” section on the same form. Can you draft that?

Keep it at the same plain-language level as the rest of the waiver. I want it to make clear that the lawyer is helping the litigant, not the third party and what the third party's role is.

AI response: *Absolutely. I’ll keep it very short and focus on only what the third party needs to understand: why they are there, who the lawyer is helping, and what their presence could mean for confidentiality.*

Acknowledgment by Third Party

- I understand that I am attending this meeting at the litigant’s request.
- I understand that the lawyer is meeting with the litigant to provide brief legal advice and does not represent me.
- I understand that the litigant’s conversation with the lawyer is normally protected by attorney-client confidentiality, but my presence may affect that confidentiality.
- I understand that I may be required by law to testify or provide information about what was discussed during the meeting.
- I understand that the lawyer may ask me to leave or end the meeting if necessary.

Third Party Name

Third Party Signature

Date

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Final Step

great! can you please put this in a word document for me?

Absolutely — I put the final version into a clean, one-page Word document with signature lines for both the litigant and third party.

Download the Third Party Confidentiality Waiver

Third_Party_Confidentiality_Waiver_2026_Final.docx
Document

Waiver of Confidentiality

I, _____, am asking for legal help from the Maryland Court Help Center.
Litigant Name

- I understand that I will meet with a lawyer from the Maryland Center for Legal Assistance (MCLA).
- I understand that what I tell the lawyer is private and protected by attorney-client confidentiality.
- I understand that I do not have to have another person with me during my meeting.
- I want the following person to be with me during my meeting with the lawyer:

_____.
Third Party Name

- I understand that having another person in the meeting may mean that my private conversation with my lawyer does not stay private.
- I understand that the lawyer or the other person may have to tell others what I said. For example, they could be required by law to testify in court.
- I choose to have this person attend my meeting even though doing so may affect attorney-client confidentiality.
- I understand that the lawyer may ask the other person to leave or end the meeting if necessary.
- I understand that everything in the Agreement for Assistance from the Help Center is part of the Waiver of Confidentiality.
- I have read this form, understand it, and sign it voluntarily.

_____ _____ _____
Litigant Name *Litigant Signature* *Date*

Acknowledgment by Third Party

- I understand that I am attending this meeting at the litigant's request.
- I understand that the lawyer is meeting with the litigant to provide brief legal advice and does not represent me.
- I understand that the litigant's conversation with the lawyer is normally protected by attorney-client confidentiality, but my presence may affect that confidentiality.
- I understand that I may be required by law to testify or provide information about what was discussed during the meeting.
- I understand that the lawyer may ask me to leave or end the meeting if necessary.

_____ _____ _____
Third Party Name *Third Party Signature* *Date*

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The Difference

Old Version

- **Written by lawyers, for lawyers.**
- **Dense & confusing language that assumed familiarity with legal process.**
- **Inconsistent with updated Limited Scope Agreement.**

New Version

- **Written by lawyers, with AI helping us think like our users.**
- **Plain language.**
- **Consistent Language with LS agreement.**
- **Clear third party acknowledgement.**

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What Else Could This Be Used For?

Review a Training or Resource for What's Confusing

Give AI a training, guide, or other resource and ask:
"What parts of this might be confusing to someone who is new to this topic? Where am I assuming they already know something I haven't explained?"

Check Materials for Consistency

Give AI several materials that are supposed to say the same thing, such as a policy, staff instructions, client handout, website, or form, and ask:
"Do any of these conflict with each other, use different terms, or give different instructions?"

Test New Forms Before Clients Use Them

Before putting out a new form, ask AI to review it from the perspective of someone who has never seen it before:
"What questions might someone have? Is there anything they could easily misunderstand?"

Check Whether Instructions Are Actually Complete

Give AI instructions for a court or legal process and ask:
"Could someone follow these instructions from beginning to end without already knowing how this process works? What steps or information are missing?"

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AI Taking on the Tedious Work

From messy call notes → organized work product

Heather Gardner
Founder & CEO
Propel Paralegal

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The problem: useful information arrives messy

Goal: turn raw notes into structured, usable work without retyping everything.

RAW CALL NOTES

Client called. Hearing 10/22. Says she sent bank statements but we're missing August. Needs to send 2025 tax return. She's unavailable next Tuesday. Call Thursday after 2. Attorney needs to review settlement offer before Friday. Client says opposing party hasn't made last two payments. Client wants to know if this affects hearing.

BEFORE AI

- ✓ Clean up and save the case note
- ✓ Identify and enter tasks
- ✓ Create a missing-document list
- ✓ Draft a separate client follow-up

Same information → several repetitive steps

The prompt

Give AI the task, the outputs you want, and a guardrail.

Organize these notes into:

1. A concise case note
2. A task list, including any deadlines mentioned
3. A list of outstanding documents or information needed from the client
4. A short follow-up email to the client

Do not add or assume any facts that aren’t contained in my notes. If something requires attorney judgment, flag it rather than answering it.

INPUT Paste the fictional call notes beneath the prompt.

What AI produces

One input becomes four structured outputs.

CASE NOTE

Client called regarding 10/22 hearing. August bank statement and 2025 tax return remain outstanding…

TASKS

- Attorney: review settlement offer before Friday
- Staff: call client Thursday after 2
- Follow up on outstanding documents

MISSING ITEMS

- August bank statement
- 2025 tax return

FOLLOW-UP EMAIL

A short client-ready draft confirming missing documents, callback timing, and that the legal question will be reviewed.

Important: review every output before it becomes work product.

The first answer does not have to be the final answer

Show the back-and-forth — this is part of using AI well.

FIRST RESULT

“The case note is useful, but it’s too long.”

Instead of starting over…

→

FOLLOW-UP PROMPT

“Make the case note much more concise, but don’t remove any substantive information.”

No new workflow. Just tell it what needs to change.

AI is conversational: review → correct → refine.

Where the human is still essential

AI can organize the work. It does not assume professional responsibility.

AI CAN HELP

- Organize supplied facts
- Extract tasks and dates
- Draft routine follow-up
- Reformat and shorten

HUMAN JUDGMENT

- Verify accuracy and completeness
- Decide legal significance
- Answer the client’s legal question
- Protect confidentiality and follow policy

Example: “Does the missed payment affect the hearing?” → flag for attorney review, not an AI answer.

Did it save time — and was it better?

The value is not “AI did my job.” The value is fewer repetitive steps.

TIME

Faster first draft

Instead of separately cleaning notes, making lists, and drafting follow-up.

QUALITY

More consistent

The same requested structure can be used each time, while the human checks the substance.

TRADEOFF

Still needs review

Speed is only useful if the result is checked for accuracy, context, and appropriateness.

For the demo: compare your own normal workflow with the live result rather than promising a universal time savings.

What else could this be used for?

Same pattern: messy or repetitive input → structured output.

Meeting notes

→ action items + follow-up

Discovery / document lists

→ organized inventories

Status updates

→ concise summaries

Survey or grant data

→ themes + reporting

Intake information

→ missing-items checklist

Email threads

→ timeline + next steps

Try it: Give AI 3–4 lines of fictional messy notes and ask it to organize them.

AI Helping me Build Something

How a non-technical legal aid provider described a problem — and an AI helped build a solution

Donald Tobin
Gordon, Wolf & Carney Professor of Law
University of Maryland Francis King Carey School of Law

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The Problem

The Regulation

LSC grant rules require every activity to be categorized as a Case, Matter, or Administrative cost under 45 CFR Parts 1630 and 1635.

The Problem

Lawyers can't be expected to analyze federal regulations for every single time entry. Most don't — so time gets miscategorized or lost.

The Cost

Miscategorized time hurts grant compliance and undercounts services delivered — affecting both reporting accuracy and future funding.

A Maryland legal aid provider described this problem. The question: could we build an AI tool to solve it?

The Process — From Idea to Working Tool

1 → 2 → 3

Interview

A legal aid provider in Maryland

Described the problem in plain English — no technical knowledge required. Just: "lawyers don't know how to categorize their time under grant rules."

Build with AI

A conversation with Claude

Described the tool needed. Claude looked up the regulations, designed the logic, and built a working prototype — all in one conversation.

Deploy to the Web

GitHub + Vercel (both free)

Uploaded the code to GitHub. Connected to Vercel. In under 10 minutes, the tool had a live URL anyone could access from any browser.

How did we accomplish this task?

1. Asked Claude: https://claude.ai/chat/89cd5144-8d17-433f-b62b-7a281dbfa9fb

2. Show tool. https://legal-timekeeping-git-main-proftobins-projects.vercel.app/

3. Question: I went to the eastern shore to provide a presentation, meet with clients, and did tabling and triage regarding advice on how to proceed with a tax problem. I drove 3 hours to the eastern shore. I met with community leaders to discuss the earned income tax credit and explain how it works. I also spoke with them about how to promote the activity in the community. the grant specifically asks us to do this type of outreach. I then with two clients. client one was case number 1568 and I met with her or 30 minutes. the other was case number 1893 and met with him for 1 hour. i then worked with a lawyers in the library program and gave advice to peope who sought advice. All of the advice was on tax issues. the tabling was for 1 hour. I then returned home driving 3 hours back to Baltimore.

What This Means for Your Organization

The barrier is lower than you think

You don't need a developer, a budget, or a technical background. You need to be able to describe your problem clearly.

Legal aid has unique AI opportunities

Grant compliance, intake screening, client communication, document review — your regulatory world is exactly where AI adds the most value.

Resources exist right now in Maryland

We are building a community to support one another.

The next step is just a conversation

Identify one repetitive, rule-based task in your organization. Describe it. That description is the beginning of your tool.

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