Maryland Volunteer Lawyers Service

PRESENTATION BY
JENNIFER HABER

MVLS

MARYLAND
VOLUNTEER
LAWYERS
SERVICE

What We Do

Maryland Volunteer Lawyers Service (MVLS) removes barriers to justice through free civil legal help, community engagement, and advocacy for equitable laws.

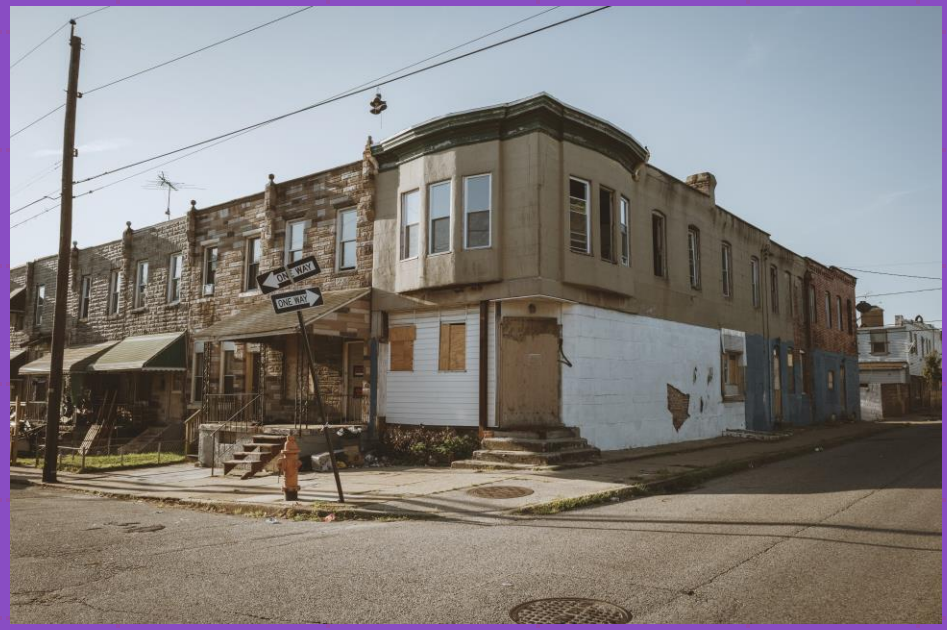
The Justice Gap

- In the United States, our legal aid system currently meets just 20% of the need for civil legal assistance.
- The remaining 80% of people, who can't afford a lawyer, are at a severe disadvantage in court.
- MVLS leverages the power of pro bono to help close the justice gap in Maryland.

- **Our vision** is for a fair legal system that is free of injustice and equitably serves underrepresented Marylanders.

Reducing Barriers Created by Structural Racism

- Many of the barriers MVLS clients face are the result of longstanding systems of structural racism.
- The high cost of legal services, combined with the racial wealth and opportunity gaps, limit the ability of many people of color to hire counsel or pursue civil cases.
- When there is a lack of diversity on the bench, it means that lived experiences of marginalized groups are often not understood or represented.
- These are just some examples of barriers created by racism and systemic inequities.



We Specialize in Civil Cases

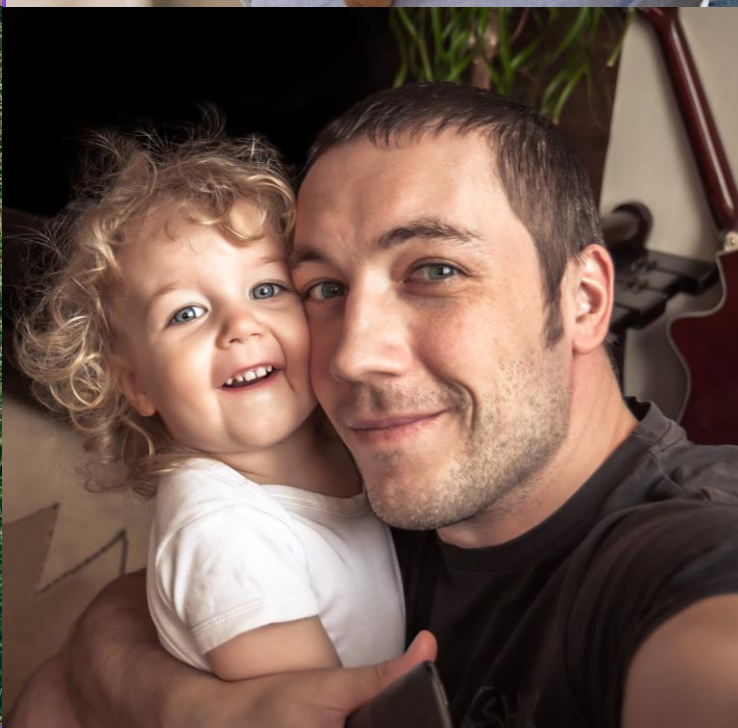
Our most common cases include family, housing, consumer finance, and criminal record expungement.

- Family
- Housing
- Consumer Finance
- Tax Controversy
- Estate Planning & Administration
- Criminal Record Relief
- Special Education
- MVLS

We match clients with volunteer lawyers, tax professionals, and staff attorneys who represent clients facing a wide range of consumer finance, family, and housing issues.

The MVLS Judicare Project for Volunteer Family Law attorneys

Please join us!



The Judicare Project

The Maryland Volunteer Lawyers Service administers a family law reduced-fee program called the Judicare Project in response to the substantial number of unrepresented low-income litigants in the family courts, especially in highly contested family law disputes.

The Judicare Project is funded through the Maryland Legal Services Corporation who provides grants to nonprofit organizations that provide civil legal services for low-income Marylanders.

Types of Family Law cases:

- For family law cases, the following cases are within our **guidelines** to accept (each case is considered individually)
- Custody: initial custody and custody modifications (must have good case for material change in circumstances) and third-party custody/de facto parent (that meet the standards for filing)
- Divorce
- SJIS Special Juvenile Immigrant Status
- Name change and Gender Affirmation
- Birth Certificate (in some instances)
- QDROs (in some instances)
- Uncontested adoptions
- Client **must be** income qualified, there are **no guarantees of representation,** but people are always encouraged to call.
- Some of the cases listed above are eligible for Judicare funding and some are handled on a pro bono basis.

Program Benefits

1. Become involved in improving the lives of others through your legal representation.

2. Interact with people from diverse backgrounds which allows one to gain and develop other perspectives.

3. **"If you're in a position to give back within your field, you should take it," Kate, a Judicare Volunteer, said. "These are people's lives—and you really are making a difference in their protection, stability, and overall quality of life."**

4. Use and develop your legal skills to enhance and grow your practice.

5. Engage with and learn from a wonderful community of committed attorneys through an interactive listserv and mentoring activities.

6. Access and participate in family law trainings provided by MVLS.

7. Develop a sense of accomplishment by providing a worthwhile and valuable service to your community and to our clients.

8. Network at two large events every year: A Taste for Pro Bono and Celebrate Pro Bono.

9. An MVLS Volunteer shared the following: "The experience strengthened my commitment to advocating for women and children in crisis. This is a reflection of the empathy and resilience that define the MVLS volunteer community.

10. Opportunity to: be featured widely as Volunteer of the Month, to receive one of our annual awards and/or to be featured on our social media pages.

Resources available to MVLS Judicare Panel Attorneys:

- Up to $4200 per case;
- A network of excellent, supportive family law attorneys; including mentorship;
- MVLS family law staff attorney;
- MVLS Judicare Listserv;
- MVLS Family Lawyer Monthly Open Office Hours;
- Malpractice insurance;
- MVLS Volunteer Resources;
- PBRC Litigation Fund;
- Office space available to meet with MVLS clients;
- MVLS Trainings;
- Discounted Westlaw access for your MVLS cases (when available);
- Some discounted Tech tools;
- Regular updates on relevant legislation, programs, and news articles affecting your area of law;
- Language Access Services; and more...

MVLS Upcoming Virtual Training and Celebrate Pro Bono
All are welcome!

- September 17 from 12-1pm - Special Education Project: An Overview of the IDEA
- The Individuals with Disabilities Act (IDEA) has been the primary federal law for special education for over 50 years. In this webinar, special education attorney will review the history of the IDEA, its main principles, and the rights it guarantees to eligible students with disabilities.

- Celebrate Pro Bono October 13 6-9pm at The Factory in Baltimore.

  Join Maryland Volunteer Lawyers Service at The Factory, a West Baltimore Opportunity Center located in one of the communities we serve, as we celebrate the remarkable impact of pro bono volunteers and community partners. Their dedication to pro bono service inspires us and changes the lives of Marylanders across the state. Register here.

MVLS Volunteer Resources at MVLSLaw.org

Some examples:

- Working with clients: videos and tip sheets such as:
  - Effective Client Communication, Sample Representation Agreement, Language Line Tips, Filing Fee Waiver Information, Tips to Breaking Poverty Barriers to Equal Justice, and more!
  - Family Law trainings: videos and tip sheets such as:
    - Legal Process for a Name Change, Impact of Mental Illness on Parenting Capacity in Child Custody, Divorce and Custody Nuts and Bolts, Why are Children Appointed to Represent Children in Maryland Custody Cases?, Preparing your SJIS case: Filings/Pleadings and Preparation, Immigration Protections for Children: How You Can Help, Guide to Third Party Custody, and more!
    - Click on MVLSLaw.org to explore and learn!

The Attorney Applicant…Easy as 1,2,3!

1. Complete brief MVLS application online;
2. Demonstrate that you have at least three years of family law experience or that you have 2 years of family law experience and a family law mentor in your firm; and
3. Complete Judicare contract and related documents.

Taking a Case

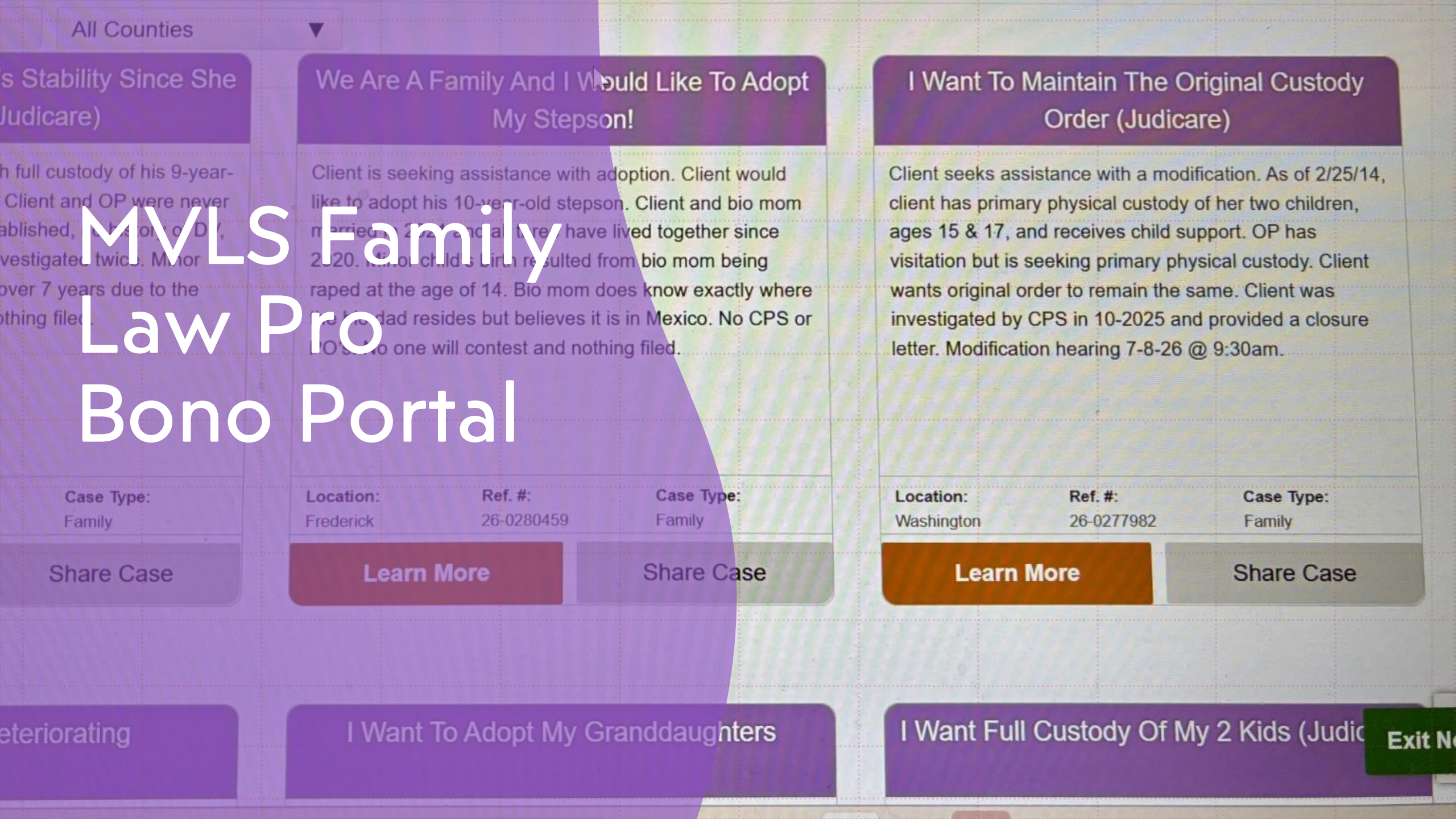
Visit the MVLS Pro Bono Portal when you are available to take a case and request case

Attorney Rate = $120 per hour. Paralegal rate = $40 per hour. Maximum = $4200 per case.

Required to complete full legal representation even if the matter exceeds the $4200 cap for services.

No charge to client for legal work provided above the maximum reimbursement.

Access to PBRC litigation fund; reimburses volunteer lawyers for many types of litigation expenses incurred during pro bono work.


All Counties
I Want To Maintain The Original Custody Order (Judicare)
Client seeks assistance with a modification. As of 2/25/14, client has primary physical custody of her two children, ages 15 & 17, and receives child support. OP has visitation but is seeking primary physical custody. Client wants original order to remain the same. Client was investigated by CPS in 10-2025 and provided a closure letter. Modification hearing 7-8-26 @ 9:30am.
Location: Washington
Ref. #: 26-0277982
Case Type: Family
Learn More
Share Case
Client is seeking assistance with adoption. Client would like to adopt his 10-year-old stepson. Client and bio mom have lived together since
raped at the age of 14. Bio mom does know exactly where
Location: Frederick
Ref. #: 26-0280459
Case Type: Family
Learn More
Share Case
I Want To Adopt My Granddaughters
I Want Full Custody Of My 2 Kids
Exit
MVLS Family Law Pro Bono Portal

Scope of Services

- Initial Consultation with Client and acceptance of case.
- Completion of an attorney client representation agreement.
- An Entry of Appearance and Filing Fee Waiver with the Court.
- Provide full legal representation for matter outlined in the representation agreement.
- Submit your invoices for payment.
- Timely case updates to MVLS when requested.
- Representation ends at completion of case/court closes case. Completion and submission of final bill with closure of case.

Opportunity for emerging Family Law Attorneys

If you do not have the requisite experience to be part of our Judicare panel, please consider joining our Family Law Cohort.

Benefits include:

- 3 Excellent, comprehensive training sessions and materials;
- Being partnered with an expert family law Mentor;
- Helping a pro bono family law client (learn while doing); and
- Support from MVLS family law attorney.

Please feel free to reach out with questions and/or to join our team!

Jennifer Haber, Esq.
(She/her)

Family Law Staff Attorney,
Judicare Program

Maryland Volunteer Lawyers Service (MVLS)

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Thank you!

NOT A VOLUNTEER? SIGN UP TODAY!

https://mvlslaw.org/volunteer/volunteer-sign-up/

MARYLAND VOLUNTEER LAWYERS SERVICE · CONTINUING LEGAL EDUCATION

Practical solutions for a modern practice

Tech tools for volunteer attorneys

Jessica Zadjura
Zadjura Family Law · Columbia and Annapolis, Maryland

ZADJURA FAMILY LAW

WHERE WE START

Sound familiar

A new client calls during a hearing. The voicemail sits until nine that night.

The same six paragraphs get retyped into every marital settlement agreement.

A client emails twice in a week asking what is happening with the case.

Time on a pro bono matter never gets recorded, so no one knows what it cost.

None of this is a discipline problem. It is a **workflow problem** , and workflow problems have tools.

LIVE CAPTURE · FOUR MINUTES

What are you already using

Practice management, calendaring, phone, e-signature, anything with an AI feature you have turned on.

ROADMAP

Where we're going

ONE	Foundation and ethics	Two Maryland rules and one guiding principle
TWO	Six tool categories	Intake through trust banking, with a break in the middle
THREE	Risk and the checklist	What to do before a tool touches a client matter
FOUR	One tool, and your questions	Twenty minutes at the end, starting with the list you make next

LIVE CAPTURE · FOUR MINUTES

What do you want answered today

We keep this list open. Whatever is still unanswered at the end goes first in the Q&A.

1

2

3

4

5

Rule 19-301.1 · Competence

> To maintain the requisite knowledge and skill, an attorney should keep abreast of changes in the law and its practice, including **the benefits and risks associated with relevant technology** .
>
> Comment [8]

The obligation is to understand the tools well enough to choose. It is not an obligation to adopt them, and not permission to ignore them.

MARYLAND ATTORNEYS' RULES OF PROFESSIONAL CONDUCT

Rule 19-301.6 · Confidentiality

> An attorney shall make **reasonable efforts** to prevent the inadvertent or unauthorized disclosure of, or unauthorized access to, information relating to the representation of a client.
>
> Rule 19-301.6(c)

Reasonable is measured against sensitivity, cost, and what the tool actually does with the information you give it.

CONTEXT

The profession has had this conversation before

Email

Was unencrypted mail a waiver of privilege? Opinions said reasonable expectation of privacy, and the bar moved on.

Cloud practice management

Could client files sit on a third party's servers? Yes, with due diligence on the vendor and its terms.

Smartphones and client texting

Where does the record live, and who else can read it? Answered with retention practice and device security.

Each time, the answer came from the same two questions: is it **competent**, and is it **confidential**. Today's AI questions are the fourth round of that inquiry.

THE GUIDING PRINCIPLE

A tool can draft, sort, answer, or remind. The judgment stays with the attorney, and so does the responsibility.

STAKES

Why this matters for volunteer attorneys

A pro bono matter competes with a paying docket for the same evening hours.

There is usually no paralegal, no receptionist, and no IT support behind the file.

The client on the other side often has no second option if the work slows down.

So the question is not whether these tools are impressive. It is whether they **give an hour back** to a matter that needs one.

CLIENT IMPACT · ONE OF THREE

Faster turnaround on time-sensitive filings

Protective order extensions, emergency custody petitions, and answers with statutory deadlines do not wait for a free Saturday.

1

Call answered the day it comes in, not the night it is returned.

2

First draft in an hour instead of an evening.

3

Signature collected remotely rather than by a second office visit.

CLIENT IMPACT · TWO OF THREE

A capacity multiplier for donated hours

MVLS runs on a fixed pool of donated hours. Nothing about a tool adds hours to that pool. What it can do is change how those hours are spent.

SPENT ON OVERHEAD

Phone tag, retyping, chasing signatures, reconstructing what happened last month

SPENT ON THE MATTER

Strategy, negotiation, the hearing, and the conversation the client actually needs

Two hours of overhead removed from each matter is, across a program, **another volunteer's worth of capacity** .

CLIENT IMPACT · THREE OF THREE

Every tool assumes something about the client

A client portal assumes a device, a data plan, an email address the client controls, and a private place to read. E-signature assumes the same. Some indigent clients have part of that list.

Ask at intake how the client prefers to receive documents, and record the answer.

Keep a paper and telephone path open for every step a portal handles.

Watch for shared devices and monitored accounts in domestic violence matters.

A tool that makes the work easier for you and **harder for the client** is the wrong tool for that matter.

COST

Working without a technology budget

Free tier

Real, limited, and often enough for one or two matters at a time. Read what the limit is before you rely on it.

Nonprofit or pro bono pricing

Several vendors discount or donate licenses for legal aid work. It is worth one email to ask, and worth asking MVLS what already exists.

Per-use

Pay for the calls answered or the documents drafted. Predictable on a small volume, and easy to stop.

Cost tiers on the following slides are **relative, not quoted** . Vendor pricing changes; confirm current terms before you commit.

SCENARIO · BEFORE

A custody modification, unassisted

Day one	Client leaves a voicemail. You are in court until four.
Day four	Third attempt connects. Intake runs forty minutes on the phone, written on a legal pad.
Day nine	Motion drafted from the last one you filed, with the wrong county in paragraph two.
Day fourteen	Client drives in to sign. Two emails asking for a status update go unanswered in between.
After	No time recorded. The hours are real but invisible.

SCENARIO · AFTER

The same matter, assisted

Day one	Call answered by a live receptionist. Structured intake lands in your inbox that afternoon.
Day two	Twenty-minute call to confirm facts and set expectations.
Day three	Draft motion generated from the matter file. You rewrite the argument and check every citation.
Day four	Signed remotely, or in person if that is what the client can manage.
After	Time captured passively. Status visible to the client without another email.

Ten days shorter, and the **legal work is unchanged**. What moved was the waiting.

ACT TWO

The tools

Six categories, in the order a matter moves through an office. Each one ends with a pause for questions.

ACT TWO · MAP

Six categories

01

Intake and phone answering

Back Office Betties · Smith.ai · Intaker

02

Communication and portals

Clio for Clients · MyCase Portal

03

AI drafting

Spellbook · Clio Draft · Clio Work · CoCounsel

04

Document review and e-discovery

Relativity

05

Billing and time capture

Rocket Matter · MagicTime

06

Trust banking

Nota by M&T Bank

01

Intake and phone answering

Who picks up when you are in a hearing, and what happens to what the caller said.

01 · INTAKE AND PHONE ANSWERING

Back Office Betties

A legal-specific answering service staffed by trained people, for business-hours coverage.

Receptionists who know family-law intake questions and can screen for conflicts.

Integrates with Clio Grow, so a new caller arrives as a structured lead record.

Human coverage during business hours. It is not a 24-hour service.

COST TIER

Mid · monthly subscription

FREE OR LOW-COST PATH

No free tier. Ask about a low-volume plan.

01 · INTAKE AND PHONE ANSWERING

Smith.ai

Around-the-clock coverage that pairs an AI receptionist with live agents.

True 24/7, including nights and weekends, when a protective order call is most likely to come in.

AI handles the first pass; live agents take the calls that need a person.

Call summaries and appointment booking push into practice management and calendars.

COST TIER

Low to mid · priced per call

FREE OR LOW-COST PATH

Small starter call plan; a low-volume month costs little.

01 · INTAKE AND PHONE ANSWERING

Intaker

AI chat and text intake for people who cannot safely or easily make a phone call.

Website chat widget that asks your intake questions and hands off by text message.

Text works from a break room or a bus. A phone call often does not.

Watch the record: chat transcripts are client communications and need to live in the file.

COST TIER

Low to mid · monthly subscription

FREE OR LOW-COST PATH

A plain contact form plus a shared text line covers the basics at no cost.

INTAKE AND PHONE ANSWERING

Questions before we move on

02

Client communication and portals

How a client learns what is happening without sending you a third email.

Clio for Clients

A client-facing portal and mobile app tied to a Clio Manage matter.

Secure messaging in place of email threads that live on both people's phones.

Document sharing and signature requests, with a record of what was sent and when.

Requires a Clio Manage subscription, and requires the client to have a device.

COST TIER

Included with Clio Manage

FREE OR LOW-COST PATH

Clio runs a legal-aid donation program. Ask MVLS what is available.

MyCase Portal

The same idea inside MyCase, with intake forms and payments in the same portal.

Messages, documents, calendar dates, and invoices in one client login.

Client-completed intake forms feed the matter directly.

Choose one portal and use it consistently. Two portals is worse than none.

COST TIER

Included with MyCase

FREE OR LOW-COST PATH

Free trial period; nonprofit pricing is worth asking about.

Keeping clients current on case status

The tool matters less than the rhythm. A short update on a fixed schedule answers the question before the client has to ask it.

Every two weeks

Two lines: what happened, what is next, and what you need from the client.

At each filing

Share the filed document in the portal so the client has their own copy.

When nothing is happening

Say so. Silence reads as neglect, particularly to a client who has been waiting months.

Most communication complaints are not about outcomes. They are about **not knowing**.

CLIENT COMMUNICATION AND PORTALS

Questions before we move on

CHECKPOINT

Where we are, and what is ahead

A full reference table with costs comes at the end of the session.

COVERED · CATEGORIES ONE AND TWO

Back Office Betties	Live legal receptionists, business hours · mid
Smith.ai	24/7 AI plus live agents, per call · low to mid
Intaker	AI chat and text intake · low to mid
Clio for Clients	Client portal and app · included with Clio
MyCase Portal	Portal, forms, payments · included with MyCase

STILL AHEAD · CATEGORIES THREE TO SIX

Spellbook	Drafting and review inside Word · mid
Clio Draft	Court forms and assembly · low to mid
Clio Work	Standalone matter-aware AI · low to mid
CoCounsel	Brief Builder and Word agent · high
Relativity	Enterprise e-discovery · awareness only
BatesFlow	Family-law discovery production · low to mid
Rocket Matter	Billing and trust accounting · mid
MagicTime	Passive time capture · low
Nota	IOLTA banking · free with an M&T account

TEN MINUTES

Break

We resume at [time] with AI drafting.

03

AI drafting

Tools that produce a first draft. Every one of them requires the same review you would give a new associate's work.

03 · AI DRAFTING

Spellbook

Drafting and review inside Microsoft Word, where the document already lives.

Useful for motions, discovery requests and responses, marital settlement agreements, and parenting plans.

Flags missing clauses and suggests language against the document you have open.

It does not know your local practice. Maryland-specific requirements are on you.

COST TIER

Mid · annual per seat

FREE OR LOW-COST PATH

Demo and trial only. No standing free tier.

03 · AI DRAFTING

Live demo

A parenting plan section, drafted and then corrected, using facts from a closed matter with names and details removed.

Screen share

One. The prompt and the facts supplied.

Two. The draft it returns.

Three. The three things I change before it goes anywhere.

03 · AI DRAFTING

Clio Draft

Court-form automation and document assembly from data already in the matter.

Fills a set of forms once from one record instead of retyping the caption twelve times.

Turns your own past documents into reusable templates with fields.

Confirm the current form version. An automated form is only as current as its library.

COST TIER

Low to mid · add-on per seat

FREE OR LOW-COST PATH

Covered by Clio's legal-aid program in some cases. Ask.

03 · AI DRAFTING

Clio Work

A matter-aware AI workspace that does not require a Clio Manage subscription.

You upload the matter documents; it answers and drafts against that file rather than the open internet.

Standalone. Worth noting for anyone whose practice management is a folder and a calendar.

A reasonable place to try one pro bono matter without changing anything else.

COST TIER

Low to mid · standalone subscription

FREE OR LOW-COST PATH

Trial available; confirm what happens to uploaded documents.

03 · AI DRAFTING

CoCounsel

The litigation-side option, tied to Westlaw research and to Word.

Westlaw Brief Builder assembles argument sections against real authority and checks a brief's citations.

The Drafting Agent works inside Word on the document you are already editing.

Citations still get read. Grounded in Westlaw is not the same as verified by you.

COST TIER

High · often bundled with a Westlaw plan

FREE OR LOW-COST PATH

Check whether your bar or MVLS access already includes Westlaw.

AI DRAFTING

Questions before we move on

04

Document review and e-discovery

Two tools: one built for family-law discovery, and one included so you recognize it when the other side has it.

Relativity

The enterprise review platform. Included for awareness, not as a recommendation.

Built for document sets measured in tens of thousands, with coding, threading, and privilege review.

Priced and staffed for large firms and vendors. It sits outside a typical volunteer caseload's budget.

Worth recognizing when opposing counsel has it, and when a discovery scope fight is the better answer.

COST TIER

Enterprise · per gigabyte and per user

FREE OR LOW-COST PATH

For most matters: an organized folder structure, consistent naming, and search in Adobe or Word.

04 · DOCUMENT REVIEW AND E-DISCOVERY

BatesFlow

Discovery production built for family law, by a divorce attorney.

Reads the discovery demand, sorts the responsive documents against each numbered item, and returns Bates-stamped PDFs with a rider and an index.

Handles scanned exhibits through OCR, which is most of what arrives in a family-law production.

Developed in New York matrimonial practice. Check its output against Maryland discovery requirements before you serve it.

COST TIER

Low to mid · subscription

FREE OR LOW-COST PATH

Thirty-day free trial: one case, up to 50 files, no card.

DOCUMENT REVIEW AND E-DISCOVERY

Questions before we move on

05

Billing and time capture

On a donated matter the record still matters: for reporting, for fee requests, and for knowing what the work costs.

05 · BILLING AND TIME CAPTURE

Rocket Matter

Practice management built around timekeeping, billing, and trust accounting.

Timers attached to the matter, so a pro bono hour is recorded even when nobody is billed.

Trust ledgers and three-way reconciliation, which is the part most spreadsheets get wrong.

A full system. Adopt it for the practice, not for a single donated file.

COST TIER

Mid · monthly per seat

FREE OR LOW-COST PATH

Free trial; solo tier is the least expensive entry point.

05 · BILLING AND TIME CAPTURE

MagicTime

Passive time capture that reconstructs the day into draft entries for you to edit.

Solves the specific problem of reconstructing Tuesday's work on Friday afternoon.

Draft entries are a starting point. You still write the narrative that a court or a program will read.

Read the terms closely. Anything observing your screen deserves a confidentiality review.

COST TIER

Low · monthly per seat

FREE OR LOW-COST PATH

Free trial. A timer in your existing calendar costs nothing.

BILLING AND TIME CAPTURE

Questions before we move on

06

Trust banking

Where a small error is a rule violation rather than an inconvenience.

06 · TRUST BANKING

Nota by M&T Bank

Business and IOLTA banking designed around how attorneys actually hold client funds.

Client-level ledgers inside the account, so the trust balance is not a spreadsheet you maintain by hand.

Built for solo and small firms, with reconciliation reports formatted for bar requirements.

Relevant on donated matters too: costs advanced and filing fees still run through the right account.

COST TIER	FREE OR LOW-COST PATH
No software fee	Free with an M&T business banking account.

TRUST BANKING

Questions before we move on

ACT THREE · RISK · ONE OF FOUR

Hallucination and the duty to verify

A drafting tool produces text that reads correctly whether or not it is correct. Fabricated citations have already produced sanctions in federal and state courts.

Read every case cited, in the reporter, before it goes in a filing.

Check dates, dollar amounts, and party names against the record, not against the draft.

Treat statements of Maryland law as unverified until you have confirmed them yourself.

Your signature on a filing is a **certification** . It does not become conditional because software drafted the sentence.

Confidentiality and vendor terms

Anything you type into a tool is a disclosure to a third party. Rule 19-301.6(c) asks what reasonable efforts you made before making it.

Ask the vendor

Is my data used to train models? Who can access it? Where is it stored, and for how long? Can I delete it?

Read for yourself

The terms of service, the privacy policy, and any data processing addendum. A confidence-inspiring website is not a term.

A free consumer chatbot and a legal product with a signed agreement are **not the same disclosure** .

Supervision and disclosure

Supervision

Output from a tool is delegated work. Review it the way you would review a first-year associate's draft, and take the same responsibility for what goes out.

Disclosure

There is no blanket duty to announce every tool. There is a duty to keep the client reasonably informed, and to answer honestly when asked.

Where a portal, an answering service, or an AI drafting tool touches the matter, a plain sentence in the engagement letter covers it.

If a client asks you not to use a particular tool on their matter, honor it and note the request in the file.

ACT THREE · PRE-USE CHECKLIST · ONE OF TWO

Before the tool touches a matter

01	Name the task it is doing. If you cannot say what it replaces, you cannot evaluate it.
02	Read the terms of service and the privacy policy. Note what happens to what you upload.
03	Confirm whether client information is used to train the vendor's models, and whether you can turn that off.
04	Turn on multi-factor authentication and use a unique password.
05	Test it on a closed matter, or on facts you have made up, before a live file.

ACT THREE · PRE-USE CHECKLIST · TWO OF TWO

Once it is in the practice

06	Decide what you will always verify by hand, and write it down.
07	Add a sentence to the engagement letter describing the tools that touch the matter.
08	Check that the client can actually use it, and keep a paper and telephone alternative.
09	Know where the record lives, so the file is complete if you withdraw or the matter transfers.
10	Tell your malpractice carrier what you use, and ask whether anything in your policy speaks to it.

ACT THREE · RISK · FOUR OF FOUR

A tool-related mistake on a pro bono matter

The Rules of Professional Conduct apply identically. There is no reduced standard for donated work.

Malpractice exposure is the same. Confirm your policy covers pro bono matters, including those placed through a program.

The client absorbs the consequence, and a client referred by MVLS has the fewest resources to absorb it.

The program carries it too. One bad outcome affects how the next volunteer's work is received.

This is not a reason to avoid the tools. It is the reason the **verification step is not optional**.

ETHICS AND RISK

Questions before we move on

ACT FOUR

The one-tool challenge

Pick one tool from today. Run it through the checklist. Use it on one matter for thirty days, then decide whether to keep it.

IF THE PHONE IS THE PROBLEM

Start with answering coverage

IF DRAFTING IS THE PROBLEM

Start with form assembly, not free-form AI

IF THE CLIENT IS ANXIOUS

Start with a portal and a fixed update rhythm

One tool, thirty days, one matter. That is **the whole assignment**.

REFERENCE

Tools at a glance

Cost tiers are relative, not quoted. Confirm current pricing with each vendor.

TOOL	CATEGORY	WHAT IT DOES	COST TIER
Back Office Betties	Intake and phone	Live legal receptionists, business hours, Clio Grow integration	Mid · monthly
Smith.ai	Intake and phone	24/7 AI plus live-agent answering and booking	Low to mid · per call
Intaker	Intake and phone	AI website chat and text-message intake	Low to mid · monthly
Clio for Clients	Communication	Client portal and app: messages, documents, signatures	Included with Clio Manage
MyCase Portal	Communication	Client portal with intake forms and payments	Included with MyCase
Spellbook	AI drafting	Drafts and reviews agreements and motions inside Word	Mid · per seat
Clio Draft	AI drafting	Court-form automation and document assembly	Low to mid · add-on
Clio Work	AI drafting	Standalone matter-aware AI assistant; no Clio Manage required	Low to mid · standalone
CoCounsel	AI drafting	Brief Builder plus an in-Word drafting agent	High · often bundled with Westlaw
Relativity	Document review	Enterprise e-discovery review platform	Enterprise · awareness only
BatesFlow	Document review	Family-law discovery production and Bates stamping	Low to mid · subscription
Rocket Matter	Billing and time	Practice management: timers, billing, trust accounting	Mid · per seat
MagicTime	Billing and time	Passive time capture that reconstructs the day into entries	Low · per seat
Nota	Trust banking	IOLTA-aware banking for solo and small firms	Free with an M&T business account

ACT FOUR

Disclosures

I have no financial relationship with any vendor named in this presentation, and I receive no compensation for mentioning them.

No vendor reviewed or approved this material. Tools were selected because they are in common use in small family-law practices.

Product features and pricing change frequently. Everything here reflects my understanding as of the date of this session.

This session is educational. It is not legal advice on your practice, and it is not an ethics opinion. Nothing here creates an attorney-client relationship.

Rule citations are to the Maryland Attorneys' Rules of Professional Conduct. Read the current text and comments before relying on them.

TWENTY MINUTES

Open questions

Starting with the list we made at the beginning. Anything from that slide we have not answered goes first.

THANK YOU

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