# Artificial Intelligence
# Use Policy - SAMPLE

## 1. Purpose

This policy establishes comprehensive guidelines for the ethical, responsible, and compliant use of Artificial Intelligence (AI) technologies within [FIRM NAME]. This policy encourages attorneys and employees to propose ideas and technologies for evaluation by firm administration, aiming to enhance productivity and efficiency while reducing costs for both employees and clients.

## 2. Scope

This policy applies to all attorneys, paralegals, staff members and independent contractors doing work for [FIRM NAME].

## 3. Approved AI Tools

Only AI tools approved by the firm's technology committee may

be used for firm-related activities. Currently authorized tools include:

- Perplexity and Chat GPT (for limited use on non-civil pleadings such as letters, emails, general internet research).

- NetDocuments

- Spellbook

- Clearbrief

- Lexis Protege

## 4. Permitted Uses

AI tools may be utilized for:

a) Legal research and case law analysis. All citations and quotes must be independently verified. As of the date of this policy, all AI large language models are still known to hallucinate, including Lexis Protégé.

b) Document review, in conjunction with individual assessments by attorneys or paralegals (if client sensitive or privileged documents, only in NetDocuments, Lexis Nexis, Spellbook and Clearbrief).

c)     Contract analysis and drafting.

d)　　Time entry.

e)　　Client intake and conflicts verification.

f)　　E-discovery.

## 5. Prohibited Uses

AI tools must not be used for:

a) Making final legal judgments.

b) Replacing attorney oversight.

c) Direct communication with clients without attorney review and supervision.

d) Managing confidential client data and information without appropriate security measures in place and software properly configured.

## 6. Data Privacy and Security

a) All AI tools must comply with [YOUR JURISDICTION] rules regarding client protected data and confidentiality.

b) Client data used with AI tools must be anonymized.

c) AI tools must operate over encrypted connections.

d) All are prohibited from entering privileged or confidential information into non-secure public AI platforms (examples, but not limited to ChatGPT, Perplexity, Claude, Deep Seek, Gemini, etc.).

## 7. Disclosure

a) Clients must be informed when AI tools are utilized.

b) AI use must be disclosed in court filings when relied upon.

## 8. Oversight

a) All AI-assisted work products must be reviewed by an attorney.

b) Attorneys are ultimately responsible for the accuracy and suitability of AI-

assisted work.

9. Training and Competence

      a) All staff and attorneys using AI must complete firm-approved training on their proper application.

      b) Attorneys must stay informed about AI developments relevant to their practice area.

10.   Ethics

      a) AI usage must stay in compliance with [YOUR JURISDICTION] Rules of Professional Conduct.

      b) AI should not be utilized in any manner that could result in unauthorized legal practice.

11.   Documentation and Audit

      a) Staff must memorialize their use of AI tools in client matters.

      b) The firm will perform regular random audits of AI usage to ensure adherence to this policy.

12.   Updates

This policy will be reviewed and revised annually or as needed to accommodate technological advancements and legal requirements.

13. Compliance

Failure to comply with this policy may lead to disciplinary measures, including termination.