AI Use Policy

[Firm Name]

EFFECTIVE DATE	POLICY OWNER	APPLIES TO	VERSION
[Date]	[Name or role]	All attorneys and staff	1.0

1. Purpose

[Firm Name] wants attorneys and staff to use AI tools to do better work for clients. This policy explains which AI tools are approved, what information must stay out of them, and who to ask when something is unclear. It applies to every attorney, paralegal, employee, contractor and temporary worker.

2. Approved AI tools

Use only the AI tools on this list for firm work, and sign in with your firm account.

- [Approved tool 1, for example Claude]
- [Approved tool 2, for example Microsoft Copilot]
- [Approved tool 3]

Any AI tool not on this list is not approved. This includes AI websites, browser add-ons, phone apps and AI programs installed on a computer.

3. Information that must never go into an AI tool

Never type, paste or upload any of the following into an AI tool that is not on the approved list. For approved tools, follow the limits in section 8.

- Client names, matter details and client files
- Privileged communications and attorney work product
- Financial records, trust account and payment information
- Passwords, sign-in codes and security details
- Health information about any person
- Anything under a protective order, court seal or confidentiality agreement

4. What you must do when you use AI

- Check everything AI produces before you use it or send it. AI can be wrong and still sound certain.
- You are responsible for the work you send, whether or not AI helped write it.
- Say that AI was used when a client, a court or the rules of professional conduct require it.
- Do not let AI make final decisions about people, such as hiring, pay or discipline.

5. How to request a new AI tool

Send the name of the tool and what you want to use it for to [Name or role]. Do not use the tool for firm work until it is added to the approved list.

6. Monitoring

[Firm Name] monitors the use of AI tools on firm computers and accounts. Monitoring shows which AI tools are used, by whom and for how long. It is used to keep this policy working and to protect firm and client information.

7. If this policy is not followed

Tell [Name or role] right away if you think restricted information was entered into an AI tool. Reporting a mistake quickly matters more than the mistake. Ignoring this policy on purpose may lead to disciplinary action.

LAW FIRM RULES

8. Client confidentiality and privilege

- Client confidential information may go only into approved tools that [Name or role] has confirmed keep firm data private and do not use it to train AI.
- Get the client's informed consent before using their confidential information in an AI tool whenever the rules of professional conduct or the engagement letter require it.
- If you are unsure whether something is privileged or confidential, treat it as if it is and ask first.

9. Accuracy, citations and court filings

- Verify every case citation, quotation and statement of law that AI produces against the original source before it goes into a filing, letter or advice.
- An attorney must review and take responsibility for all AI-assisted work product before it leaves the firm.
- Follow any standing order or local rule on disclosing AI use to the court.

10. Supervision, client communication and billing

- Supervising attorneys are responsible for how the people they supervise use AI.
- Tell clients about the firm's use of AI when the engagement terms or the rules require it.
- Bill only for time actually worked. Do not bill for hours that AI saved.

I have read and understand this AI Use Policy.

Name	Signature	Date

This template was written with ABA Formal Opinion 512 (2024) in mind. It is a starting point, not legal advice. Confirm it against your own state's rules of professional conduct before you adopt it.