

AI-Generated Content Checklist for Lawyers

As any pilot can tell you, one great way to manage risk is the use of a safety checklist. A clear, repeatable checklist can help lawyers safely use AI while maintaining accuracy, ethics, and client trust.

With that in mind, here is a repeatable checklist of ten recommendations for using AI tools in legal work for clients:

- 1. Use firm-approved tools.**

Avoid uploading client data into public AI models; stick with secure, legal-specific systems like [Clio Work](#). (Because Clio Work is fully integrated with Clio Manage and firm DMS tools such as iManage and NetDocuments, you can keep your client work in a secure environment end to end).

- 2. Confirm security and confidentiality.**

Confirm before using any tool that it guarantees [Zero Data Retention](#) and meets the highest standards of security, such as [SOC-2 Type II](#).

- 3. Check for accuracy.**

Verify all facts, case law, and citations manually, just like you would with an associate or allied professional at the firm. Verify facts, assumptions, and conclusions.

- 4. Cross-check sources.**

Trust only verified databases such as [Clio Library](#), which gives you access to the world's largest collection of case law and legal knowledge through Vincent AI.

- 5. Analyze reasoning quality (logic audit).**

Check whether the AI follows [IRAC/CRAC](#), uses correct doctrinal tests, avoids blended jurisdictions, and provides reasoning (not just conclusions).

- 6. Map all content to the correct jurisdiction.**

General AI frequently mixes federal/state or provincial rules. Verify that the content reflects the correct region's laws, terms of art, definitions, and standards.

- 7. Look for bias.**

Ensure the content doesn't misrepresent the holdings of cases or use biased examples. Generative AI can reflect bias in training data, sometimes unintentionally.

- 8. Confirm court formatting and procedural compliance (if applicable).**

Check margins, headings, case caption format, signature blocks, required clauses, and exhibit treatments. AI often gets formatting wrong or fails to capture local requirements.

- 9. Ensure ethical compliance.**

Follow ABA Model Rules, [state rules of professional responsibility](#), or Law Society guidance on AI-assisted work.

10. Require final human sign-off.

Every piece of AI-generated work must be verified and reviewed by a lawyer before release to a client, court, or opposing counsel.

Note: This checklist is provided for informational purposes only and does not constitute legal or business advice.

Template created by Clio.

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