

# 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.

#### **About Clio.**

Clio is the world's leading provider of cloud-based legal technology, providing lawyers with low-barrier, affordable solutions to manage and grow their firms more effectively, more profitably, and with better client experiences. It redefines how lawyers manage their firms by equipping them with the tools they need to run their firms securely from any device, anywhere.

Clio is headquartered in Vancouver, Canada, and has offices in Toronto, Calgary, Dublin, and Sydney, including a global workforce of over 1,500 employees.

- More than **150,000** legal professionals use Clio
- Clio is used in more than **130** countries
- **300+** app integration partners in our ecosystem
- **17 years** of building innovative cloud-based solutions for the legal industry
- More than **100** law societies and bar associations recognize Clio, including all 50 State Bar Associations in the United States
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