

How to Use These Documents

Matter: E.1066 MCLE, Folder 49 (Product Policy Documents)

Date: 2026-08-07

What these are

The firm's AI policy (the Model Firm AI Use Policy) deliberately names duties, not products. A new tool never means a new policy; it means a row on the Approved Tool List, a required setup, and the same duties as everything else. The documents in this set are those rows, expanded: one document per product, per way of working, showing exactly how the policy lands on that tool. They implement the policy; none of them replaces or restates it.

Every document follows the same eight sections (the template is document 02): what the tool is, the filled Approved Tool List row, the required setup steps, what may go in, verification, the record, the vendor facts with evidence grades, and the changes that would void the document's conclusions.

The set

- 03. Document:** ChatGPT Business | **Way of working:** chatbox | **Status:** Ready to adopt
- 04. Document:** Claude Team | **Way of working:** chatbox | **Status:** Ready to adopt
- 05. Document:** Microsoft 365 Copilot | **Way of working:** add-in, suite-wide | **Status:** Ready to adopt
- 06. Document:** Cursor with Privacy Mode | **Way of working:** harness | **Status:** Ready to adopt
- 07. Document:** Embedded AI Features | **Way of working:** cross-product card | **Status:** Rule live now
- 08. Document:** CoCounsel (Thomson Reuters) | **Way of working:** platform | **Status:** Conditional
- 09. Document:** Lexis+ AI / Protégé (LexisNexis) | **Way of working:** platform | **Status:** Conditional, restricted
- 10. Document:** Vincent (vLex / Clio) | **Way of working:** platform | **Status:** Not approved on public terms
- 12. Document:** Harvey | **Way of working:** platform | **Status:** Ready to adopt (contract-verified)
- 13. Document:** Legora | **Way of working:** platform | **Status:** Ready to adopt (contract-verified)
- 14. Document:** Cost and Configuration Estimates | **Way of working:** one-page companion sheet | **Status:** Reference

What the status labels mean

- **Ready to adopt:** the evidence supports the filled row today. Every such document still has signup-day confirmations in its Section 3; "ready" means ready to execute those steps, not ready to skip them.
- **Ready to adopt (contract-verified):** the same, and stronger: the load-bearing protections were read in the vendor's published standard contract stack, not inferred from documentation pages. Harvey and Legora both publish their full stacks; their Section 3 checklists confirm the standard forms apply unmodified at the order form.
- **Conditional:** permitted for Tier 1 use at most, until a stated contract event (usually a signed agreement restating the vendor's published claims). The document's Section 3 is the ask list for the vendor negotiation.

- **Not approved:** the document exists to say why, and what would change the answer. Keep it; it is the firm's institutional memory for the next sales call.

How to read one

If the firm is adopting a tool, the responsible person reads that tool's document start to finish once, then works from Section 3 (setup) with Section 2 (the row) as the completion record. Staff read Sections 4 through 6 of the tools they use; those three sections are the daily-use core. Section 7 is for whoever negotiates with the vendor. Section 8 belongs to the AI Policy Administrator's annual review.

The evidence discipline

No factual claim about a vendor appears in these documents without a source exhibit in this folder's Exhibits directory, cited with its retrieval date and graded: **contract** (terms that bind), **published** (vendor documentation, changeable tomorrow), or **absent** (not established anywhere public). Where a claim's grade is weak, the document says so in the text. Exhibit 11 is the memo that grades the full evidence base.

The cost sheet (document 14) adds three grades of its own, because pricing is a weaker fact class: **configurator** (a range off the vendor's own self-serve quote tool), **reported** (press figures the vendor does not publish; usable in a question for the vendor, never in a budget), and **estimate** (the firm's own setup-time figures, derived from each document's Section 3). Exhibit 20 is the pricing evidence memo.

Keeping the set alive

Vendor terms, defaults, and even product names change without notice (OpenAI renamed its Team tier "ChatGPT Business"; Microsoft changed which companies' models serve Copilot; both happened before this set was a day old). Each document's Section 8 lists its specific re-vetting triggers. The standing rule: at each annual policy review, and on any vendor announcement touching a listed trigger, the Administrator re-pulls the cited exhibit's source page and updates the document. A document whose exhibits are stale is a document whose conclusions are unverified.