AI at [FIRM NAME]: One-Page Quick Reference

From: John A. Kelly

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Re: One-page staff quick reference: AI use under the firm policy

Post near every workstation. The full policy controls; this is the daily-use summary.

Setup (once)

1. Use only tools on the firm's Approved Tool List, through the firm account. Never a personal account for client work.
2. Confirm training on inputs is OFF and memory is OFF in your tool settings. Sixty seconds; non-negotiable.
3. Work in the firm-configured environment (system instructions, formats), not a bare consumer chatbot.
4. AI features inside other software (videoconference assistants, PDF tools, scheduling apps) stay OFF unless that feature is on the Tool List. An embedded AI feature is a tool.

Before you type (every session)

1. Check the input tier. Public info and anonymized hypotheticals: any approved tool. Client documents: enterprise-configured approved tools only. Sealed, protected, or client-restricted material: stop and ask the responsible attorney.
2. Strip client identifiers where the tool does not need them. Use placeholders (the Placeholder Card gives the conventions and the substitution prompt).
3. Check the client's engagement terms: some clients restrict AI use. The matter intake sheet flags this.

Research and drafting

1. Ground the tool: give it the actual statute text or treatise chapter and instruct it to cite only from provided material (sources: the Grounding Sources appendix; prompts: the Verification Prompt Pack).
2. Never trust a citation you did not verify. The four steps, every citation, every time:

- Does the case exist? (Pull it on Westlaw/Lexis.)
- Does the quotation appear in the opinion? (Full-text search.)
- Does the case actually support the proposition? (Headnotes, then the passage itself.)
- Is it still good law? (KeyCite or Shepard's, on the specific point.)

1. Verify statutes and rules against official text (leginfo.ca.gov), not the model's memory.
2. AI add-in open in Word? The whole document goes to the account the add-in is signed into, so the input-tier rules apply to the document, not just your prompt. Have the tool edit in tracked changes, or keep before-and-after versions and run Word's Compare; review every change before accepting. Never let it edit silently in place.

Before anything leaves the office

1. Attorney review of the final document, always. No AI system files, signs, or sends anything on its own.
2. Stress-test briefs: ask the AI what is weak, what cuts against us, what is missing. Opposing counsel will.
3. Check the local rules and judge's standing orders for AI provisions (see the firm's County Compliance Matrix). Santa Clara ex parte filings require AI disclosure in the filing.
4. Note in the matter file: tool used, tasks, verification done.

If something goes wrong

1. Found a fabricated citation or error, before or after filing? Tell the responsible attorney immediately. Correction first, fast; concealment is the career-ender. The sanctions cases (Mata, Noland, Farris) all got worse after the error because of what came next.