

Law Firm Generative AI Policy

A starter framework for Texas law firms

This sample policy is provided for educational purposes and should be adapted to the firm's practice areas, client requirements, court rules, and technology environment.

Scope. This policy applies to any AI tool or AI feature used for Firm work, including tools built into research, drafting, email, document, browser, intake, and practice-management software.

Approved Tools. Do not use ChatGPT, Claude, Gemini, Microsoft Copilot Chat, Perplexity, or similar general-purpose AI tools for Firm work. Use only AI tools approved by the Firm for the specific task. Client or matter information must not be entered into any AI tool unless the Firm has approved the tool for that specific use. Approved tools must be designed to protect client confidentiality, keep client matters separate, restrict access to authorized users, and preserve lawyer review.

Lawyer Review. AI output is a draft, not authority. The responsible lawyer must verify all citations, quotations, facts, calculations, and legal conclusions before any AI-assisted content is sent, shared, filed, or relied on. Every AI-assisted client document, filing, and external legal communication must have a responsible lawyer.

Client Disclosure and Consent. As a Firm practice, the Firm will disclose its use of generative AI to clients and obtain client consent before using generative AI in a client matter. Consent may be obtained in the engagement agreement or through matter-specific written consent. The disclosure should explain, in plain language, how generative AI may be used, that client or matter information will be entered only into approved tools, what safeguards the Firm uses to protect confidentiality, and that a lawyer remains responsible for the final work product.

Court Disclosure and Certification. Before filing any AI-assisted document, the responsible lawyer must check all applicable court rules, local rules, standing orders, judge-specific procedures, agency rules, and forum requirements. The responsible lawyer must make any required AI disclosure and file any required certification concerning AI use, lawyer review, or verification of citations, quotations, legal analysis, factual assertions, and record references. If disclosure or certification is not required, the lawyer must not include one unless the lawyer determines that doing so is appropriate under the circumstances and consistent with the client's interests.

Billing. Bill only for time actually spent using, reviewing, correcting, or verifying AI-assisted work. Do not bill for time saved by AI. Do not bill a client to learn a Firm AI tool. Treat general AI subscriptions as Firm overhead unless the client has agreed otherwise and the expense is actually incurred for the matter.

Training and Incidents. No one may use AI for Firm work until trained, and training must be refreshed at least annually. Report any unauthorized use, suspected confidentiality breach, security incident, or AI-generated false authority immediately, especially if the false authority was used, shared, filed, or nearly used without correction.

Firm Administration. The Firm will maintain the approved-tools list, including approved uses for each tool. The Firm may update this policy and the approved-tools list as technology, ethics rules, court requirements, and Firm needs change.

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