

Responsible AI Use Planning Guide



Use this guide as a planning scaffold

You do not need to answer every question every time you use AI. Early in your legal research career, you may write out a formal research plan to build good habits; over time, many of those steps become second nature. This guide works the same way: use it to slow down, identify risks, choose a strategy, and build responsible AI-use habits that become part of ordinary professional judgment.

1

Why Am I Using AI Here?

Start with the purpose, not the tool.

- What task am I trying to accomplish?
- Am I using AI to save time, get unstuck, organize, draft, summarize, or check my work?
- Is this a task where AI adds value - or could make the work riskier?
- Am I using AI because it is the right tool, or because it is available? What would I do without it?

Planning notes:

2

What Role Should AI Play?

Define the tool's role before you use it.

- Should AI be a brainstormer, summarizer, drafter, editor, critique partner, or research starting point?
- Should AI be excluded from this task entirely?
- What parts of the work must remain human-controlled?
- What output would be useful without being treated as final?

Planning notes:

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What Information Am I About to Share?

Pause before pasting facts, documents, or client information.

- Does the material include names, addresses, dates, locations, or other identifying facts?
- Does it include confidential, privileged, proprietary, personal, or sensitive information?
- Am I allowed to use this tool for this kind of material?
- Can I sanitize or generalize the information without distorting the task?

Planning notes:

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What Assumptions Am I Bringing to the Tool?

AI use is shaped by what you expect the tool to do.

- Am I assuming the tool is current or has access to legal authority?
- Am I assuming it understands jurisdiction, procedure, or source hierarchy?
- Am I assuming polished prose means accurate analysis?
- What could the tool get wrong even if the output sounds confident?

Planning notes:

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What Instructions Does the Tool Need?

A vague prompt creates vague supervision.

- Have I identified the role, audience, task, and output format?
- Have I provided only the facts the tool may use?
- Have I told the tool not to speculate or add facts?
- Have I asked the tool to flag assumptions, gaps, and uncertainty?

Planning notes:

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What Risks Do I Need to Manage?

Different tasks require different safeguards.

- Could the tool fabricate authority, facts, quotations, or procedural history?
- Could it omit an exception, element, defense, or jurisdiction-specific rule?
- Could it overstate certainty, flatten nuance, or remove strategic caution?
- Could it make the work sound better while making it less accurate or more biased?

Planning notes:

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What Verification Strategy Will I Use?

Do not wait until the end to decide how you will check the work.

- What claims will need independent verification?
- What sources will I use to verify legal authority?
- What facts will I check against the record, assignment, or source document?
- How will I confirm quoted language, currency, contrary authority, and missing issues?

Planning notes:

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What Should I Do With the Output?

AI output is not the final work product.

- Can I use the output only for brainstorming, organization, or further research?
- Can I revise portions into my own draft, or should the output be discarded?
- What legal, factual, or strategic decisions still need to be made?
- What would I need to change before I could stand behind the work?

Planning notes:

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What Should I Document?

Responsible AI use includes a record of choices made.

- What tool did I use, and what task did I ask it to perform?
- What information did I provide?
- What limitations or safeguards did I use?
- What did I verify, reject, or revise?
- What professional judgment did I apply, and what would I disclose if asked how AI was used?

Planning notes:

Bottom line

Do not begin with “Can AI do this?” Begin with “Why am I using AI, what role should it play, what could go wrong, and how will I remain responsible for the final work?” AI can support legal work, but it does not remove the need for judgment, supervision, verification, confidentiality analysis, or accountability.

Practice note

This guide is not exhaustive. It is meant to support responsible planning, not to identify every possible question or risk. The questions you should ask will vary depending on the assignment, document, audience, tool, client matter, and professional setting. In practice, firm policies, court rules, client instructions, confidentiality obligations, supervisor expectations, practice-group norms, and internal risk-management decisions should ultimately control whether and how AI tools are used.