

CLICKOAI LAW FIRM GUIDE 06 OF 63

AI Role Guide for Paralegals

Define permitted use, review, escalation and competence evidence.

Use it when	paralegals are using or testing AI but role limits and review are unclear
Boundary	Role design does not replace professional judgment, competence or supervision duties.

Built for independent law firms in England and Wales

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1. Frame the decision

Separate operation, legal review, workflow ownership and stop authority. Each needs a real person and observable action.

Specific focus

Separate safe operation from qualified legal approval and make escalation practical.

Questions to answer

- For this guide: Separate safe operation from qualified legal approval and make escalation practical.
- Who may submit material?
- Who checks legal judgment?
- Who owns access and incidents?
- Who may stop use?

Avoid

- assigning responsibility to the team
- using seniority instead of a defined check
- assuming a supplier supervises use

2. Control sheet

Treat a blank evidence field as a reason to pause, not a reason to guess. Record sources and owners before changing the workflow.

Area	Evidence to collect	Pass condition
Operator	Permitted task and inputs	Works inside boundary
Reviewer	Factual and legal checks	Qualified and resourced
Owner	Scope and measures	Can change workflow
Control	Access and incident review	Specialists approve
Stop	Halt and recovery route	Users know it

Fail closed	If an input, owner or approval is missing, record the gap and keep the affected step outside the proposed change.
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3. Working record

Complete this page with counts, dates and named sources. Do not include client names, matter names, contract text or privileged material.

Field	Evidence or answer
Guide focus	Separate safe operation from qualified legal approval and make escalation practical.
Workflow	
Operators	
Reviewer	
Training evidence	
Monitoring	
Stop owner	

Evidence quality check

- The source is named and dated.
- An estimate is labelled as an estimate.
- The owner can reproduce the measure.
- The same method can be used after a change.

4. Decision record

Select the outcome that the evidence supports. A stop or no-change decision is valid.

- Stop: a required source, owner or approval is missing.
- Fix: repair the underlying route before adding technology or cost.
- Test: run one bounded change with a baseline and review date.
- Proceed: adopt only the option supported by the recorded evidence.

Decision field	Record
Chosen outcome	
Reason and evidence	
Owner and approvers	
Review or expiry date	

Primary sources

[SRA: Effective supervision](#)

[SRA: Compliance tips for AI and technology](#)

[Law Society: How to use lawtech in your practice](#)

[SRA: Confidentiality of client information](#)

Source status

Links checked 18 August 2026. Confirm the current version and obtain appropriate professional advice before relying on regulated, contractual, privacy, security, insurance, financial or wellbeing conclusions.