

# AI in Government Offices: Practical Use Cases and Cautions

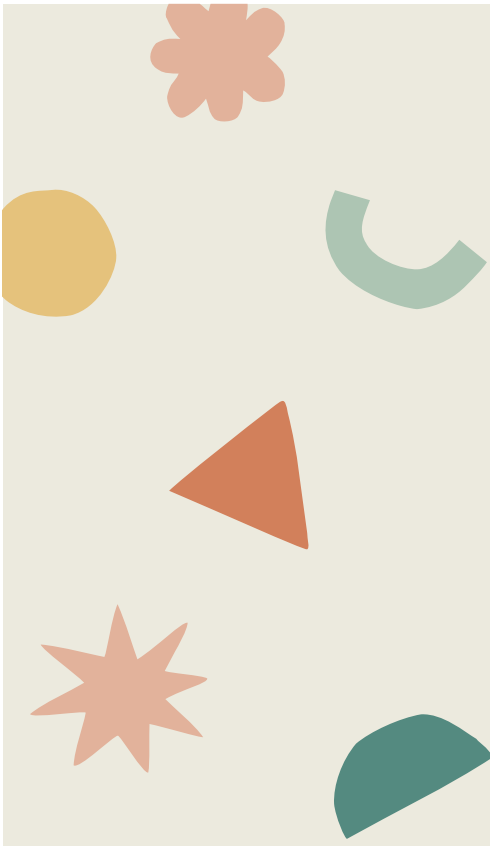
## Artificial Intelligence for City & Municipal Paralegals

Enhancing legal support through advanced AI technologies



This presentation was created with the assistance of AI tools.

## Introduction and Purpose



# Artificial Intelligence for City & Municipal Paralegals



## Responsible AI Use

AI supports paralegal tasks while ensuring attorney oversight, confidentiality, and public accountability.

## Legal and Ethical Compliance

AI use is governed by state law, ethical rules, and public trust obligations in the municipal context.

## Human Judgment Essential

Despite AI advances, human judgment, professional responsibility, and transparency remain fundamental.

## Future Regulatory Framework

Training emphasizes compliance with Texas Department of Information Resources rules effective in 2026.

## Purpose of This Presentation

### Core AI Concepts

Introduces AI concepts relevant to paralegal workflows and highlights AI features in standard office software.

### Appropriate and Prohibited Uses

Defines responsible AI use such as drafting and summarizing, while prohibiting legal conclusions and responsiveness decisions.

### Legal and Ethical Governance

Summarizes Texas laws and administrative rules ensuring ethical AI governance, documentation, and human oversight.



# AI Use in the Paralegal Office

## Why AI Matters to Municipal Paralegals



### Integration of AI Tools

AI is integrated into daily tools like word processing and document management used by municipal paralegals.

### Handling Sensitive Information

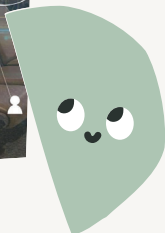
Paralegals manage confidential records and litigation materials, requiring careful handling of sensitive data.

### Legal Compliance and Risks

Texas law regulates AI use in government, making compliance essential to avoid legal and public record violations.

### Importance of AI Understanding

Understanding AI's capabilities and limits is vital to protect confidentiality and maintain accuracy in work.





## Appropriate and Inappropriate AI Uses

### Appropriate AI Functions

AI supports drafting outlines, summarizing materials, creating timelines, and simplifying complex text while preserving human oversight.

### Prohibited AI Uses

AI must not provide legal advice, replace judgment, decide legal rights, or be considered an authoritative source.

### Ensuring Accountability

Maintaining attorney review and preventing AI from making legal decisions protects municipalities from legal risks.

## Prompting and Practical Scenarios



## Prompting AI Safely and Effectively

### **CLEAR and SAFE Framework**

The framework guides safe AI prompting by emphasizing context, format, scope, audience, safety instructions, and verification.

### **Structured Prompting**

Effective prompts request structured outputs like summaries or tables rather than subjective judgments to ensure safe use.

### **Legal Risk Avoidance**

Avoiding requests for legal judgment reduces risk; neutral summaries for attorney review are safer and appropriate.

### **Reusable Prompt Templates**

Using reusable templates promotes consistency and defensibility in AI prompting practices.



## Common Paralegal AI Scenarios

### **Document Summarization**

AI generates draft summaries highlighting facts and themes, with clear labels for attorney review and validation.

### **Document Organization**

AI organizes documents and creates indexes in workflows like open records and discovery, without deciding legal classifications.

### **Litigation Hold & Cleanup**

AI inventories files and provides summaries for litigation hold or contract cleanup, with attorneys determining relevance.

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## TITLE & FRAMING: PRACTICAL AI USE FOR MUNICIPAL PARALEGALS



### AI as Productivity Assistant

AI supports paralegals by assisting drafting, summarization, and organizing tasks without replacing legal judgment.

### Risk and Confidentiality Controls

AI can err with confidence, so confidentiality and privilege boundaries must be strictly maintained in AI use.

### Legal and Government Compliance

AI outputs are subject to public information laws and record retention, requiring careful adherence to open records obligations.

### Human Accountability Emphasis

Humans remain responsible for accuracy, judgment, and compliance; escalation is required when uncertain about AI outputs.

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## QUICK AGENDA: WHAT WE'LL PRACTICE (PROMPTING → DEMO → SCENARIOS → ESCALATION)

### CLEAR and SAFE Prompting

Learn to prompt AI accurately using clear requests, scope limits, and explicit safety instructions.

### Interactive Prompt Rewriting

Practice rewriting risky prompts into structured, safe requests avoiding legal judgments.

### Safe Use Case Demonstrations

Demo AI tasks like summarizing text, building timelines, organizing emails, and drafting outlines safely.

### Realistic Legal Scenarios

Explore scenarios on records summarizing, discovery support, and litigation hold review with clear boundaries.

### Escalation and Verification

Understand escalation steps and build a culture of verification to ensure accuracy and accountability.

## How to Prompt AI for Best Results

Keep in mind	Watch out	Try this
AI changes fast; treat guidance as a starting point.	Overconfidence: AI can sound certain even when wrong.	Iterate: ask for a shorter/clearer version or a different format.
You are responsible; use AI as an assistant, not a decision-maker.	Hallucinations: plausible but incorrect facts/citations.	Add verification: list claims that need checking and how to verify.
Prompts/outputs may be records subject to retention/open records.	Sensitive data in prompts; don't include what shouldn't be disclosed.	Use the "public website test": if you wouldn't post it, don't prompt it.
Collaboration improves results and shared prompt patterns help teams.	Using the wrong tool/account; confirm approved tools for City work.	Ask clarifying questions first: request up to 5 questions to fill gaps.

### SCENARIO 1 — SUMMARIZING 200 PAGES FOR ATTORNEY REVIEW



#### Proper Use of AI in Summarizing

AI should be used to structure and draft summaries without making legal judgments or adding facts.

#### Restrictions on AI Use

Avoid uploading privileged documents to unauthorized tools and do not treat AI output as final legal advice.

#### Verification and Attorney Review

Spot-check AI summaries for accuracy and ensure attorney reviews before relying on the content.

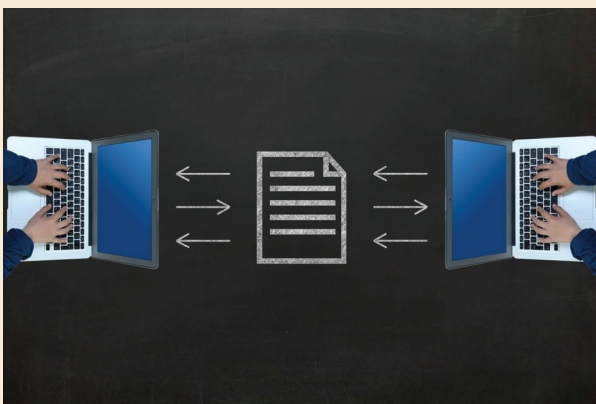
#### Ethical and Policy Compliance

Follow ethics guidelines and document labeling to ensure accuracy and proper record retention.

## Scenario 2—Open Records, Discovery, or HR File Review (High-Risk Boundary)

Allowed (AI for Organization)	Not Allowed (Legal Determinations)
Create inventories by date/type; deduplicate files; group records by neutral categories; draft non-final internal summaries for attorney review.	Decide responsiveness, exemptions, privilege; generate final redactions; determine what must be disclosed or withheld; interpret HR/medical/investigative records as a legal conclusion.
Use only approved tools and keep prompts free of sensitive identifiers where possible.	Upload confidential personnel, medical, CJIS, or privileged work product into unapproved platforms.

## SCENARIO 3—LITIGATION HOLD REVIEW OR CONTRACT FILE CLEANUP



### AI-Enabled Metadata Cleanup

AI assists in inventorying files by metadata like date and contract type, streamlining document sorting tasks.

### Restrictions on AI Usage

AI cannot determine litigation hold scope or interpret legal meanings to ensure accountability and compliance.

### Safe Workflow Process

Attorneys define criteria; paralegals use AI for organization; attorneys confirm scope and relevance to ensure accuracy.

### Governance and Accountability

Documentation and clear labeling of AI outputs maintain transparency and support legal defensibility.



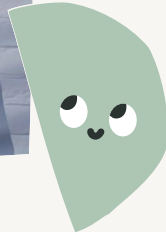
**How are you  
using AI?**

**How do you  
want to use AI?**

Let's give it a try!

**Conclusion and  
Escalation**

# When in Doubt, Do This First



## **Pause and Escalate**

Paralegals must stop work and escalate issues when facing uncertainty to ensure proper handling.

## **Information Classification**

Classify information and remove sensitive details before proceeding to protect confidentiality.

## **Use Approved Tools**

Confirm usage of approved AI tools and request structured outputs, not decisions, from AI systems.

## **Consult and Label Drafts**

Label AI-assisted outputs as drafts and consult attorneys or IT before finalizing or filing documents.