

TEMPLATE 8 · PRIVILEGE

## Privilege Review & Redaction AI Safeguard Certification

### CASE CAPTION

Court	Case no.
Plaintiff(s)	Defendant(s)
Judge	Magistrate / related
Filing certified (title)	Dkt.

### FILER

Attorney name	Bar no.	State
Firm	Role (e.g., lead, co-counsel)	
Client (or redacted id.)	Date of certification	

### AI USE IN PRIVILEGE WORKFLOW

- Privilege classifier.** AI used to surface candidate privileged documents for attorney review (no AI-only privilege calls).
- Redaction proposal.** AI used to propose redactions; every proposed redaction reviewed and approved or rejected by attorney.
- Privilege-log entry generation.** AI used to draft initial privilege-log entries; every entry reviewed and approved by attorney before logging.
- Quality-control sampling.** AI used to sample produced and withheld sets for QC; results reviewed by privilege-review supervisor.

### AI TOOL IDENTIFICATION

Identify each generative or analytical AI tool whose output contributed to the filing. Where a court rule or standing order carves out embedded legal-research AI (e.g., W.D.N.C. Standing Order, June 27, 2024), mark the carve-out column to preserve that position on the record.

Tool 1 — vendor	Product / model	Version
_____	_____	_____

Deployment (cloud / on-prem / ZDR API)	Task performed
Tool 2 — vendor	Product / model
Version	
Deployment (cloud / on-prem / ZDR API)	Task performed
Tool 3 — vendor	Product / model
Version	
Deployment (cloud / on-prem / ZDR API)	Task performed

## DEPLOYMENT & DATA-HANDLING SAFEGUARDS

- Tool deployed with contractual zero data retention; vendor confirms no model training on inputs.
- Tool deployed in single-tenant or virtual private cloud environment dedicated to this matter or this client.
- Tool deployed on-premises or in air-gapped environment.
- Federal Rule of Evidence 502(d) order entered prior to AI-assisted review.
- Vendor SOC 2 Type II report on file with counsel; reviewed within the last 12 months.
- Attorneys conducting privilege review trained on tool capabilities, limitations, and verification responsibilities (Model Rule 5.3).

## CERTIFICATION

The undersigned counsel certifies that:

- (1) No AI tool made a final privilege determination in this matter; each privilege call reflected in the production set and privilege log was reviewed and made by an attorney.
- (2) The AI tool(s) identified above were deployed with the safeguards checked above; counsel has reviewed vendor documentation and is satisfied that no privileged or work-product material was disclosed to any unauthorized party as a result of AI tool use.
- (3) Counsel preserves, for the duration of this matter and any subsequent claw-back or privilege dispute, the audit logs documenting the AI's classification or redaction proposals and the attorney decisions made in reliance on or in deviation from those proposals.
- (4) Inadvertent production of privileged material, if any, is subject to the Federal Rule of Evidence 502(d) order entered in this matter and to the parties' clawback agreement.

No confidential, client-identifying, or privileged information was entered into any generative AI tool other than a tool contractually committed to zero data retention and non-training use. Use of AI has not resulted in the disclosure of any confidential or business-proprietary information to any unauthorized party, consistent with Model Rule 1.6 and the duty of confidentiality owed to the client under the applicable jurisdiction's professional conduct rules.

## SIGNATURE

Signature

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**Printed name**

**Bar no.**

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**Firm**

**Date**

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**Email**

**Phone**

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