

LEGAL VELOCITY AI

LVAI Pro

Step-by-Step Manual

From a blank computer to a finished, verified legal document — every step, every click, with pictures.

What this manual covers

- Part 1 — Getting everything installed (Claude account, Claude Desktop, Midpage or Descrybe, the Legal Velocity connector, the LVAI Pro plugin)
- Part 2 — Working in Cowork: your case folder, the connectors and the  commands
- Part 3 — Every LVAI Pro command explained, one chapter each: research, writing, verification, citation binders, hyperlinking, exhibit binders and certification exhibits, discovery, real-estate closings, forms
- Part 4 — When something goes wrong: fixes for every common problem, questions people ask, and how updates reach you
- Cheat sheet and plain-English glossary

LVAI Pro version 13.5 · Manual edition September 2026 · Support:
admin@legalvelocity.ai · www.legalvelocity.ai

How to use this manual

This manual assumes you have never used Claude, never installed a plugin and never heard the word "connector". Nothing is skipped. If a step looks too obvious, skip it — but if you get stuck, come back and do every step exactly as written.

The way things are written

When you see	It means
Click Continue	Words in bold are things you click (a button, a menu, a tab). They are spelled exactly as they appear on your screen.
Type <code>claude.com</code>	Words in a grey box are things you type, exactly as shown. Do not add anything.
1 2 3	Red numbers in the text match the red numbers drawn on the picture next to it, so you can see exactly where to click.
Customize → Connectors	An arrow means "and then": open Customize , and then click Connectors inside it.
Type this (or copy and paste it): Check my LVAI Pro license status	A dashed box is a message to send to Claude. Type it word for word (or copy and paste), then press Enter (Mac: Return).
 Checkpoint. You see...	A checkpoint tells you what your screen should look like when a step worked. If it doesn't, go back one step.
 Careful	A red box is a warning: something that can cost you money, time or a client's confidence.

Mac or Windows?

Everything in this manual works on a **Mac** and on **Windows**. Where the two differ, both are given. The pictures were taken on a Mac; on Windows the windows look slightly different but the buttons have the same names. Keyboard shortcuts: on a Mac, **⌘ C** copies and **⌘ V** pastes; on Windows it is **Ctrl C** and **Ctrl V**.

Three words you will see all the time

Word	Plain English
Claude	The AI assistant made by Anthropic. You talk to it by typing. It comes as a website (claude.ai), as a program for your computer ("Claude Desktop") and as a phone app. LVAI Pro runs in Claude Desktop with Cowork on a paid Claude plan (Pro or Max; Team and Enterprise through your organization owner). Custom connectors are a paid-plan feature. The phone app and the web app cannot run the file-based commands.
Connector	A link between Claude and an outside service. You will add two connectors (Legal Velocity and your research service; three if you use both Midpage and Descrybe): Legal Velocity brings LVAI Pro's legal skills to Claude and checks your license; Midpage or Descrybe is the legal-research service that holds the actual court opinions.
Plugin	A small file (<code>lvai-pro.plugin</code>) you install once. It adds the LVAI Pro commands — <code>/research</code> , <code>/verify</code> , <code>/binder</code> and the rest — to Claude's message box.

Getting help

If a step does not work the way this manual says, look in **Part 4 — When something goes wrong** first. If that does not solve it, email admin@legalvelocity.ai with (1) the chapter and step number, (2) what you see on the screen (a screenshot is perfect: Mac **⌘ Shift 4**, Windows **Windows key + Shift + S**), and (3) whether you are on a Mac or on Windows. Never email sign-in codes or any client document.

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PART 1

Getting everything installed

You will do this part **once**. It takes about 45 minutes, most of it waiting for emails and downloads. Do the chapters in order — each one needs the one before it.

What you need before you start

You need	Why
A Mac or a Windows computer	LVAI Pro runs inside Claude Desktop, which only exists for computers (not for phones or tablets).
Your work email address, and access to that mailbox	Claude, Midpage/Descrybe and Legal Velocity all send you confirmation emails and codes.
A credit card	Claude's paid plan (about \$20 a month) and your legal-research service (Midpage or Descrybe) are separate subscriptions that you pay to those companies. Legal Velocity does not see or charge that card.
Your LVAI Pro setup email	It came from admin@legalvelocity.ai with the subject "LVAI Pro — your setup guide and license (LV-XXXX-XXXX)" — or, for a free trial, "LVAI Pro — your free trial has started: setup guide and license (LV-XXXX-XXXX)", or, for a complimentary license, "LVAI Pro — your complimentary license (free through YYYY-MM-DD): setup guide (LV-XXXX-XXXX)". The LV-XXXX-XXXX part is your License ID. The email is your setup guide (the address it came to is your sign-in) and has the plugin download button, and this manual is attached to it. Can't find it? Search your mailbox for Legal Velocity and look in Spam/Junk. Still nothing? Email admin@legalvelocity.ai .

The eight chapters of Part 1: 1 Create your Claude account (5 min) · 2 Choose a paid Claude plan (5 min) · 3 Install Claude Desktop (10 min) · 4 Get a Midpage or Descrybe account (10 min) · 5 Connect it to Claude (5 min) · 6 Add the Legal Velocity connector (5 min) · 7 Install the LVAI Pro plugin (3 min) · 8 Check that everything works (2 min).

Create your Claude account

Goal: an account at Claude (the company is Anthropic) tied to your work email.

Already have a Claude account? Skip to Chapter 2.

1

Open your web browser — Safari, Chrome or Edge, whichever you normally use.

2

Click in the address bar at the very top of the browser window, type `claude.com` and press **Enter** (Mac: **Return**).

3

The Claude home page opens with a sign-in box on it (picture 1). Choose how to sign in:

- **1 Continue with email** — recommended. Use your work email.
- **2 Continue with Google** — only if your work email is a Google/Gmail account and you want to sign in with it.

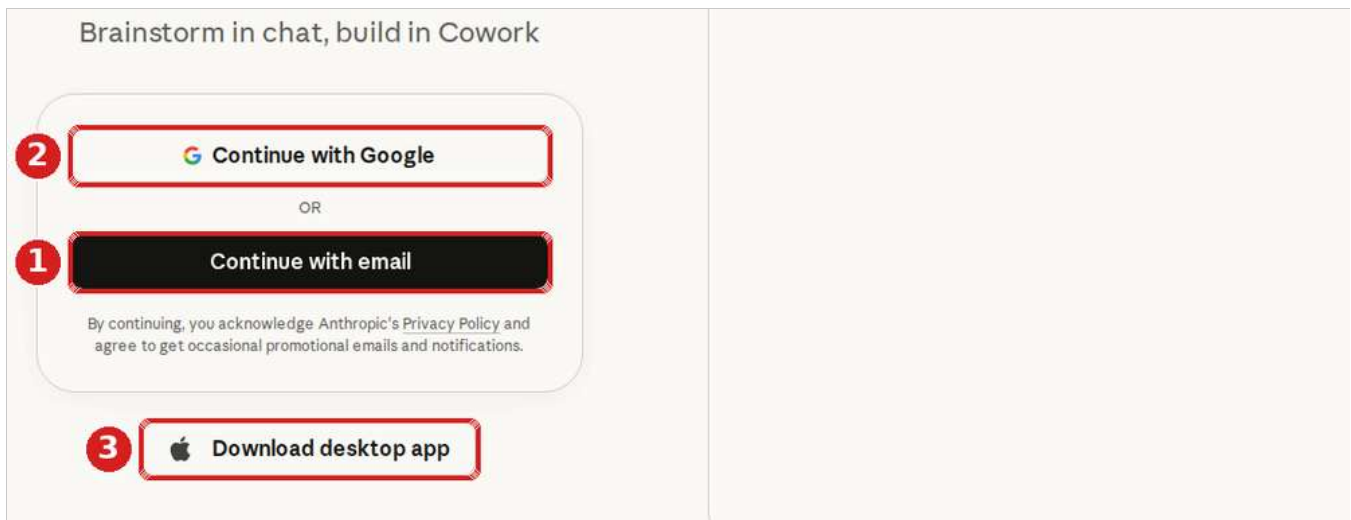
Ignore **3 Download desktop app** for now — that is Chapter 3.

4

If you chose **Continue with email**: type your email address and click **Continue**. Claude sends you an email with a **code** (or a "Log in" link). Open your mailbox, find the email from Claude (check Spam/Junk), and type the code into the browser — or click the link in the email.

5

Claude asks for your **full name** and to accept its terms. Type your name, tick the box, click **Continue**. If it asks a few questions about how you will use Claude, answer them or click **Skip**.



Picture 1. The sign-in box on claude.com. 1 Continue with email · 2 Continue with Google · 3 the desktop-app download (Chapter 3).



Checkpoint. You see a page with a big message box that says *"How can I help you today?"*. You now have a Claude account.



Write it down. Note which way you signed in (email code, or Google). You will sign in exactly the same way inside Claude Desktop in Chapter 3. Claude does not use a password with the email option — every time, it emails you a fresh code.

Choose a paid Claude plan

Goal: a Claude **Pro** (or **Max**) subscription.

Why: LVAI Pro runs in Claude Desktop with Cowork on a paid Claude plan (Pro or Max; Team and Enterprise through your organization owner). The phone app and the web app cannot run the file-based commands. The free plan will not work. If your firm already has a Claude **Team** or **Enterprise** plan, you are covered: skip to Chapter 3 (and see the note at the end of this chapter about your organization owner).

1

In the browser, go to claude.com/pricing (or, if you are already signed in: click your initials in the bottom-left corner → **Settings** → **Billing** → **Upgrade**).

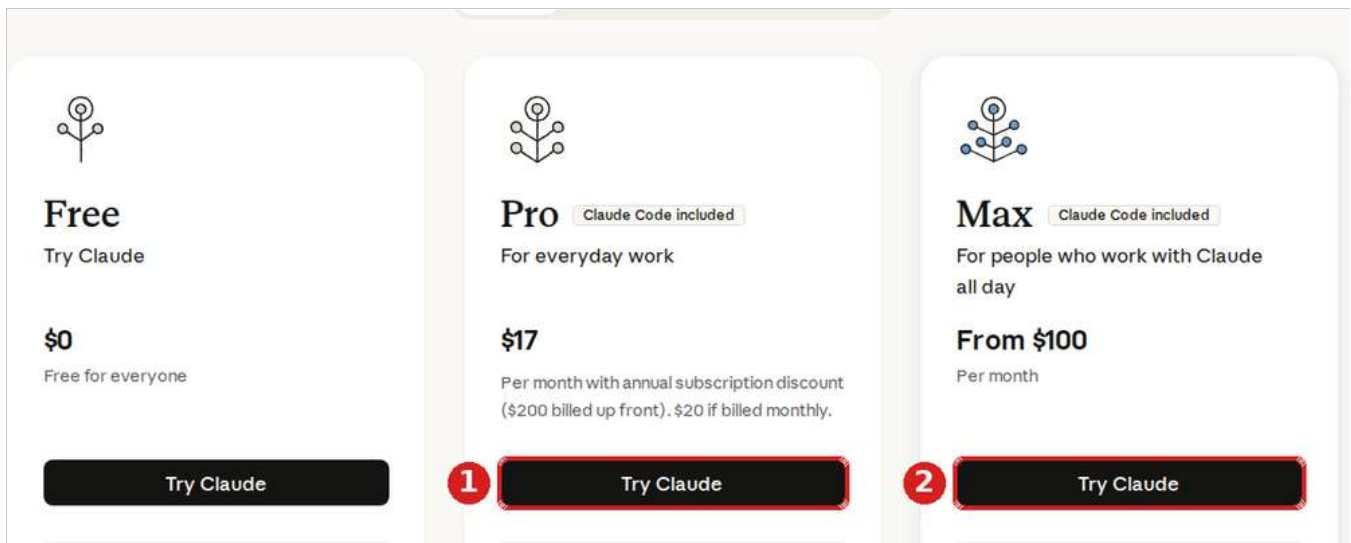
2

Pick a plan (picture 2):

- **1 Pro** — \$20 a month billed monthly, or \$17 a month if you pay the year up front (\$200). Enough to start and for occasional use. **Click the black button under Pro.**
- **2 Max** — from \$100 a month, with much more usage. Legal Velocity AI recommends running complex legal work on **Opus 5.5 at Max effort** (Part 2, Chapter 9), which uses 5.5× or more of Claude's usage; long binders and deep research at that setting can reach Pro's limit. If you will work that way every day, choose Max.

3

Anthropic's payment page opens. Type your card number, expiry, security code and billing address, then click **Subscribe**. This is Anthropic's page — Legal Velocity never sees this card.



Picture 2. The plans page. **1** Pro — enough for most people · **2** Max — for very heavy daily use. Prices are Anthropic's published prices in September 2026; check the page for today's prices.



Checkpoint. Click your initials (bottom-left) → **Settings** → **Billing**. It says **Pro** (or Max).



Firm on Team or Enterprise? Your firm's Claude administrator ("organization Owner") adds the Legal Velocity connector for everyone under Organization settings → Connectors, and you then click Connect on it. Send them Chapter 6 of this manual; each member then clicks Connect and signs in with the license email. Everything else in this manual is the same.

Install Claude Desktop on your computer

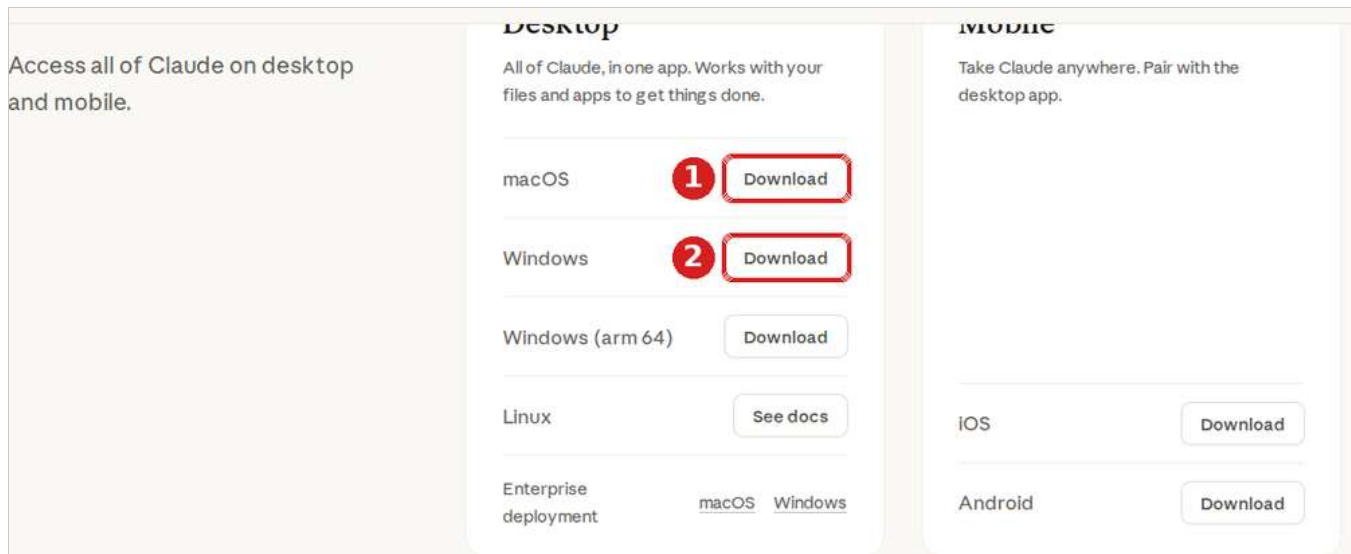
Goal: the Claude Desktop program installed and signed in.

Why: LVAI Pro works on the files in a folder on your computer (your brief, your exhibits, your contract). Only Claude Desktop — the program, not the website — can open a folder on your computer. This is what Claude calls **Cowork**.

- 1 In the browser, go to `claude.com/download`.
- 2 Under **Desktop** (picture 3), click the **Download** button for your computer: **1 macOS** for a Mac, **2 Windows** for a Windows PC. (Ignore "Windows (arm 64)" unless your IT person told you your PC is an ARM computer — almost none are.)
- 3 Wait for the download to finish. It lands in your **Downloads** folder.
- 4 **On a Mac:**
 - 1 Open **Finder** → **Downloads** and double-click `Claude.dmg`.
 - 2 A window opens showing the Claude icon and an **Applications** folder. **Drag the Claude icon onto the Applications folder.** Wait for the copy to finish, then close that window.
 - 3 Open **Launchpad** (or **Finder** → **Applications**) and click **Claude**. If your Mac says "Claude is an app downloaded from the internet — are you sure you want to open it?", click **Open**.
- 5 **On Windows:**
 - 1 Open **File Explorer** → **Downloads** and double-click the file you downloaded (its name starts with `Claude` and ends with `.exe`).
 - 2 If Windows asks "Do you want to allow this app to make changes to your device?", click **Yes**. Follow the installer: **Next** → **Install** → **Finish**.
 - 3 Claude opens by itself. Later you start it from the **Start menu** → **Claude**.

6

Claude Desktop asks you to sign in. Sign in **exactly the way you did in Chapter 1** (email code, or Google). It may open your web browser for the sign-in and then jump back to the app — that is normal.



Picture 3. claude.com/download. **1** Mac · **2** Windows.



Checkpoint. The Claude Desktop window is open on your screen, you see your name, and the message box says *"How can I help you today?"* with two small buttons under it: **Chat** and **Cowork**.



Keep it in reach. Mac: right-click the Claude icon in the Dock → Options → **Keep in Dock**. Windows: right-click Claude in the Start menu → **Pin to taskbar**. Claude Desktop updates itself; when it asks to restart to update, say yes.

Get a legal-research account: Midpage or Descrybe

Goal: an account with **one** of the two legal-research services LVAI Pro can read court opinions from.

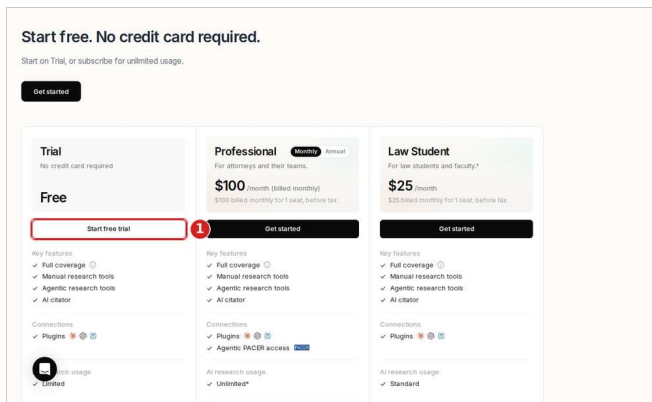
Why: when LVAI Pro researches, verifies, hyperlinks or builds a citation binder, it reads the *actual opinions*. It gets them from Midpage or from Descrybe — your own subscription, separate from LVAI Pro. Without one of them, the research and verification commands cannot run. (The real-estate, form-filling and exhibit-binder commands do not need it.)

Which one?

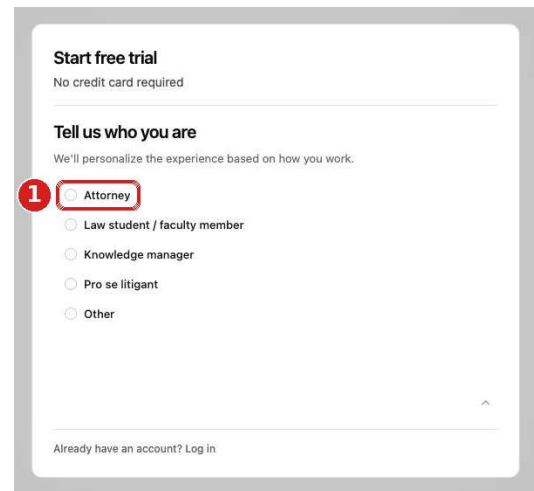
	Midpage Legal Research	Descrybe Legal Engine
Website	midpage.ai	descrybe.com
Price	Free 2-week trial, no card. Then Professional, \$100 a month per person.	Legal Engine, \$25 a month (or the Platform plan at \$50 a month, which includes it).
Good for	Case law, statutes, dockets and court documents (including PACER access on the Professional plan).	Case law, statutes, rules and regulations; a cheaper way to get verified research.
Our advice	Either works with every LVAI Pro command; Midpage is the more accurate of the two and has the statutes built in, so its links open the section on Midpage itself. Not sure? Start with Midpage's free trial and decide in two weeks. Cross-check mode: If you connect both Midpage and Descrybe, every research command — /research, /deep-research, /case-summary, /verify, /correct, /binder, and /draft when it researches — checks every authority, holding, quotation and treatment on both services and tells you where they disagree. Links go to Midpage (Descrybe links only if you ask). That is the strongest anti-hallucination check LVAI Pro can do. Prices are the providers' published prices in September 2026 — confirm on their sites.	

Option A — Midpage (free trial, then \$100 a month)

- 1 In the browser, go to `midpage.ai` and click **Pricing** at the top. You see three plans (picture 4). Under **Trial**, click **1 Start free trial**. (Or go straight to `app.midpage.ai/sign-up`.)
- 2 The sign-up page says "Start free trial — No credit card required" and asks "Tell us who you are" (picture 5). Click **1 Attorney**, then **Continue**.
- 3 Fill in the screens that follow: your name, your **work email** and a **password** (or "Continue with Google"). Midpage emails you a confirmation — open it and click the link.
- 4 **Write down the email and password you used.** You will type them again in Chapter 5 when Claude connects to Midpage.



Picture 4. Midpage's plans. **1** Start free trial.



Picture 5. The sign-up page. **1** Attorney.

i **When the trial ends** (after two weeks), Midpage asks you to choose a plan and enter a card. Pick **Professional**. Until you do, the research commands will stop working — nothing else in LVAI Pro is affected.

Option B — Descrybe (\$25 a month)

- 1 In the browser, go to `descrybe.com/connect` (picture 6) and click **1 Get started** at the top right.

2

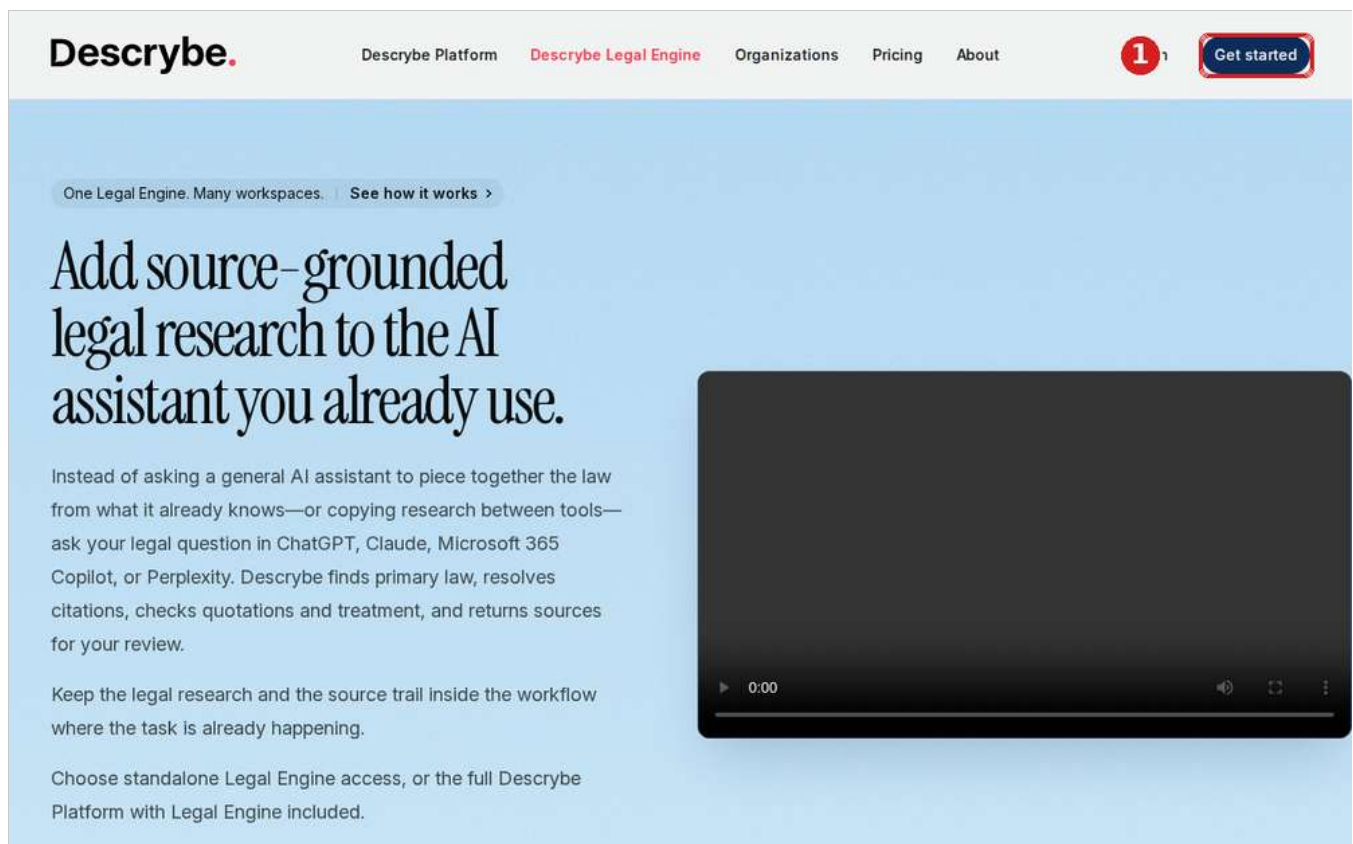
The page "Choose where you want to do the legal research" appears (picture 7). Click the **1 Describe Legal Engine — \$25 / month** card. (Choose **Describe Platform** only if you also want to use Descrybe's own website for research; it includes Legal Engine.)

3

Create your account with your **work email** and a **password**, enter your card and confirm the subscription. If the page shows an introductory-offer code, type it in the promo-code box before paying.

4

Write down the email and password you used. You will type them again in Chapter 5.



Picture 6. descrybe.com/connect. **1** Get started.

Choose where you want to do the legal research.

Work in the full Descrybe Platform, or bring Legal Engine into supported assistants and apps. Platform includes Legal Engine access. You can manage eligible plan changes or stop future renewals from your account.

Descrybe Platform

Descrybe Legal Engine included

Best for repeat research, brief review, saved history, direct primary-law search, and Word work product.

\$50 / month

Introductory offer: Use code LAUNCH50 for 50% off your first month.

☒ Full Descrybe workspace

Descrybe Legal Engine

Best for adding Descrybe research and verification to supported AI assistants or authenticated internal tools.

\$25 / month

Introductory offer: Use code LAUNCH50 for 50% off your first month.

☒ Use Descrybe Legal Engine across supported assistants and apps

Picture 7. Descrybe's plans. **1** Legal Engine is all LVAI Pro needs.



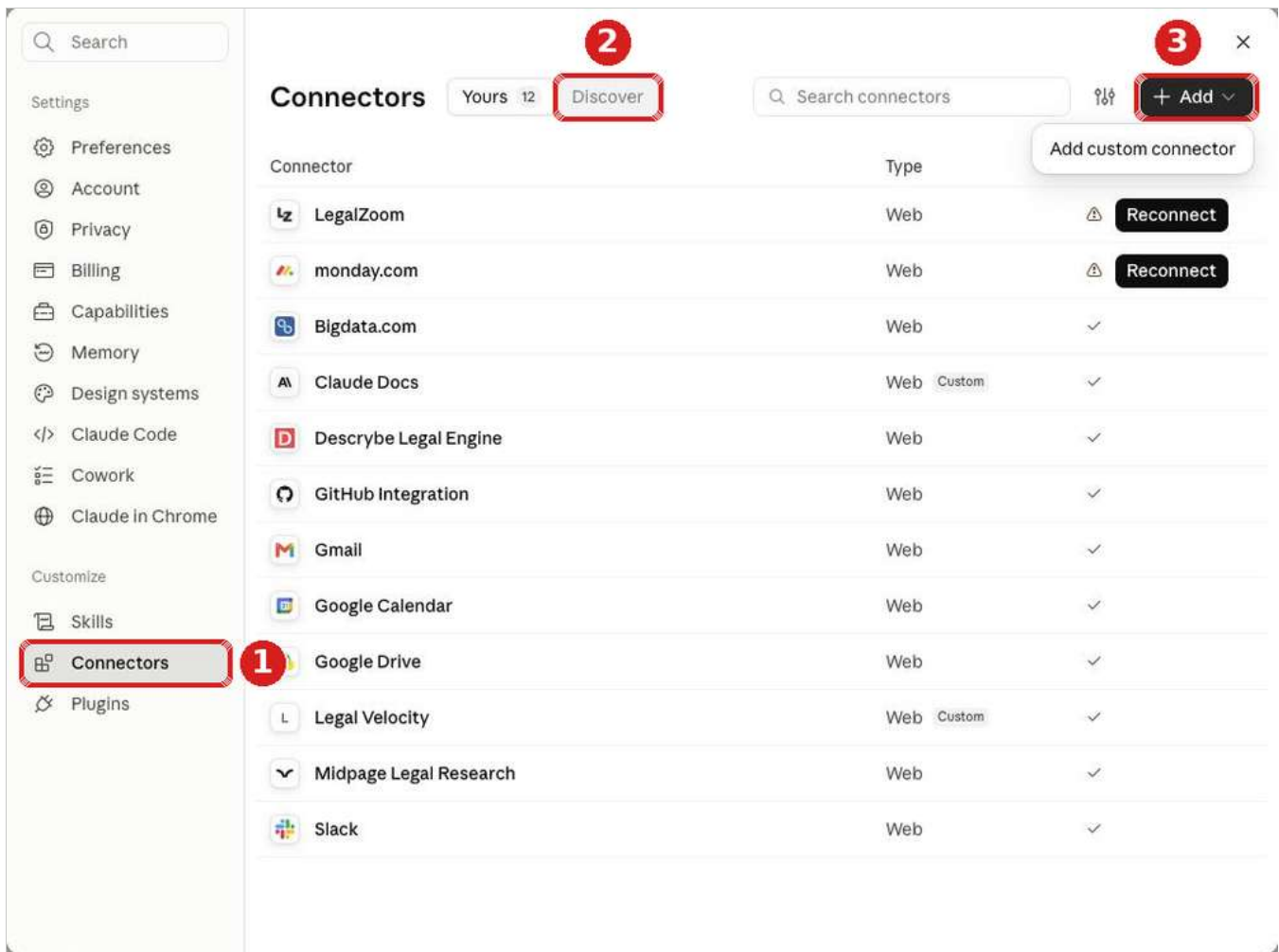
Checkpoint. You can sign in to midpage.ai (or descrybe.com) with the email and password you wrote down.

Connect Midpage or Descrybe to Claude

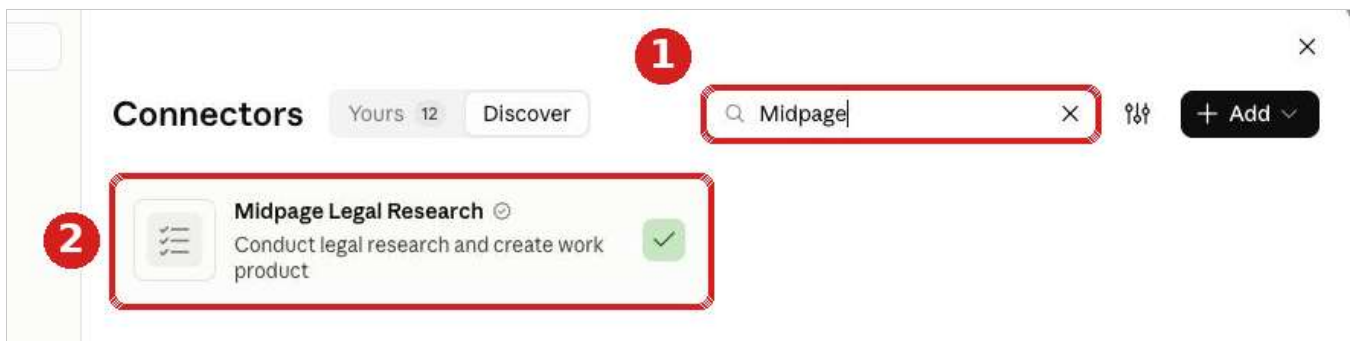
Goal: Claude can read court opinions from your Midpage or Descrybe account.

Where: inside Claude Desktop (Chapter 3). You can also do this on the claude.ai website — the settings are the same and shared.

- 1 Open **Claude Desktop**. Click your **initials or name in the bottom-left corner** of the window, then click **Settings**. A settings window opens with a list on the left (picture 8).
- 2 In that left list, under the heading **Customize**, click **1 Connectors**.
- 3 At the top of the Connectors page click the **2 Discover** tab. (The **Yours** tab shows what you already have; **Discover** shows what you can add.)
- 4 Click in the **1 search box** (picture 9) and type — or if that is what you signed up for in Chapter 4.
- 5 A card appears: **2 Midpage Legal Research** (or **Descrybe Legal Engine**). Click it, then click its **Connect** button.
- 6 A browser window opens asking you to **sign in to Midpage** (or Descrybe). Type the email and password you wrote down in Chapter 4 and sign in.
- 7 The service asks whether Claude may use your account. Click **Allow** (it may say **Authorize**, **Approve** or **Continue**). For Descrybe, allow **all** the tools it lists. The browser then says you can close the window and go back to Claude.
- 8 Back in Claude's Connectors page, the card now shows a green tick ✓ instead of a Connect button — exactly as in picture 9.



Picture 8. Claude's settings window. ① Connectors, under Customize · ② the Discover tab · ③ the + Add button, used in Chapter 6.



Picture 9. ① Search box with "Midpage" typed in · ② the Midpage card. The green tick means it is connected.



Picture 10. The same for Describe: search **1** , then the Describe Legal Engine card **2** .



Checkpoint. Click the **Yours** tab at the top of the Connectors page. **Midpage Legal Research** (or **Describe Legal Engine**) is in the list with a ✓ on the right.



Only for the real-estate date calendar. If you will use `/calendar-dates` (Part 3, Chapter 25), connect your calendar the same way: search `Google Calendar` or `Outlook` on the Discover tab, click Connect, and sign in to Google or Microsoft. Nothing else in LVAI Pro needs it.

Connect Legal Velocity

Goal: Claude is linked to Legal Velocity, which delivers the LVAI Pro skills and checks your license.

You need: access to the mailbox your LVAI Pro setup email came to (from admin@legalvelocity.ai). That address is your sign-in.

Where, in one line: Customize → Connectors (older versions: your name → Settings → Connectors) → the Discover tab → search Legal Velocity → Connect. The steps below show every click.

! One Claude account per seat. Legal Velocity is connected by signing in, not with a secret address, so there is nothing to copy and nothing that can leak. Each seat works on **one** Claude account at a time: if someone signs in to your seat from another Claude account, your connection is signed out and you get an email saying so. If that was not you, email admin@legalvelocity.ai. A colleague needs a seat of their own (Part 4, "Can two people in my firm use one license?").

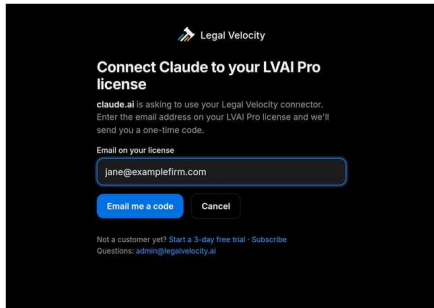
- 1 In Claude Desktop, open **Settings** (your initials, bottom-left → **Settings**) and click **Connectors** under Customize (picture 8, **1**). Make sure the **Discover** tab is selected (picture 8, **2**).
- 2 In the search box type `Legal Velocity`. The **Legal Velocity** card appears (the gavel logo, "by Legal Velocity AI") — exactly like the Midpage card in picture 9. Click **Connect** on it.
Not listed? Until Claude's directory shows the card, add it by address instead: click **+** **Add** → **Add custom connector** (picture 11), type the name `Legal Velocity` and the address `https://mcp.legalvelocity.ai/mcp` (picture 12 shows the two boxes), click **Continue / Add**, then click **Connect** on the new row. Everything from step 3 on is the same.
- 3 Your web browser opens the **Legal Velocity sign-in page** (picture 13a). Type the email address your setup email came to and click **Email me a code**.

4

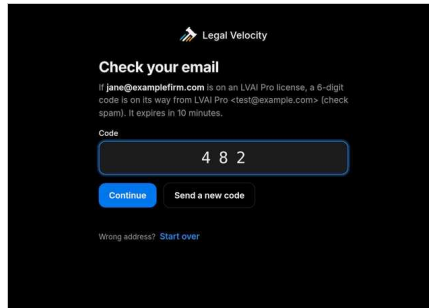
Look in that mailbox for an email from LVAI Pro with the subject "**Your Legal Velocity sign-in code**" (check the spam folder if it takes more than a minute). Type the six digits on the "Check your email" page (picture 13b) and click **Continue**. The code works for ten minutes; **Send a new code** gets you another.

5

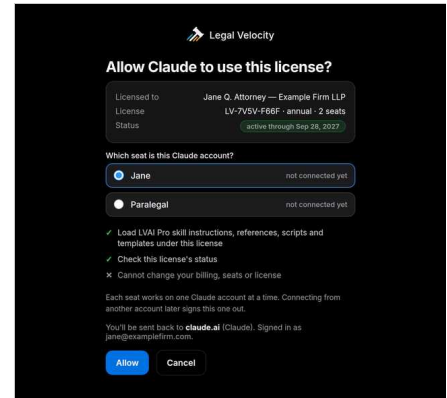
The "Allow Claude to use this license?" page shows your license (picture 13c). If your firm has several seats, choose **your** seat — with one seat there is nothing to choose. Click **Allow**. The browser sends you back to Claude by itself; if the page stays open, close it and go back to Claude.



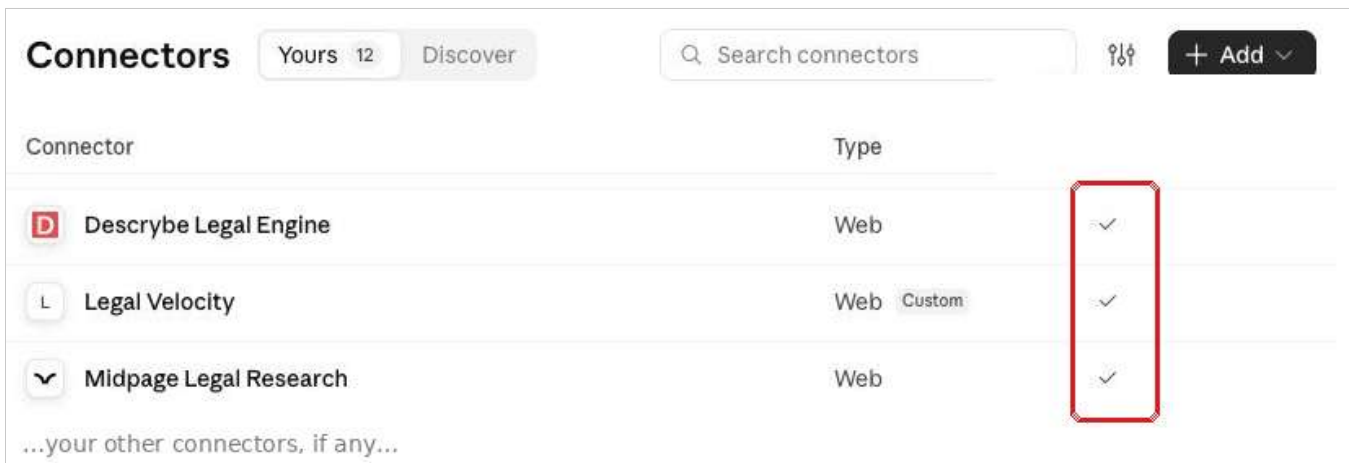
Picture 13a. The sign-in page: your email address, then *Email me a code*.



Picture 13b. The six digits from the email, then *Continue*.



Picture 13c. Your license, your seat, *Allow*.



Picture 13. Done: the Yours tab lists **Legal Velocity** and your research service, each with a ✓.



Checkpoint. On the **Yours** tab, **Legal Velocity** appears with a ✓ (picture 13).

i

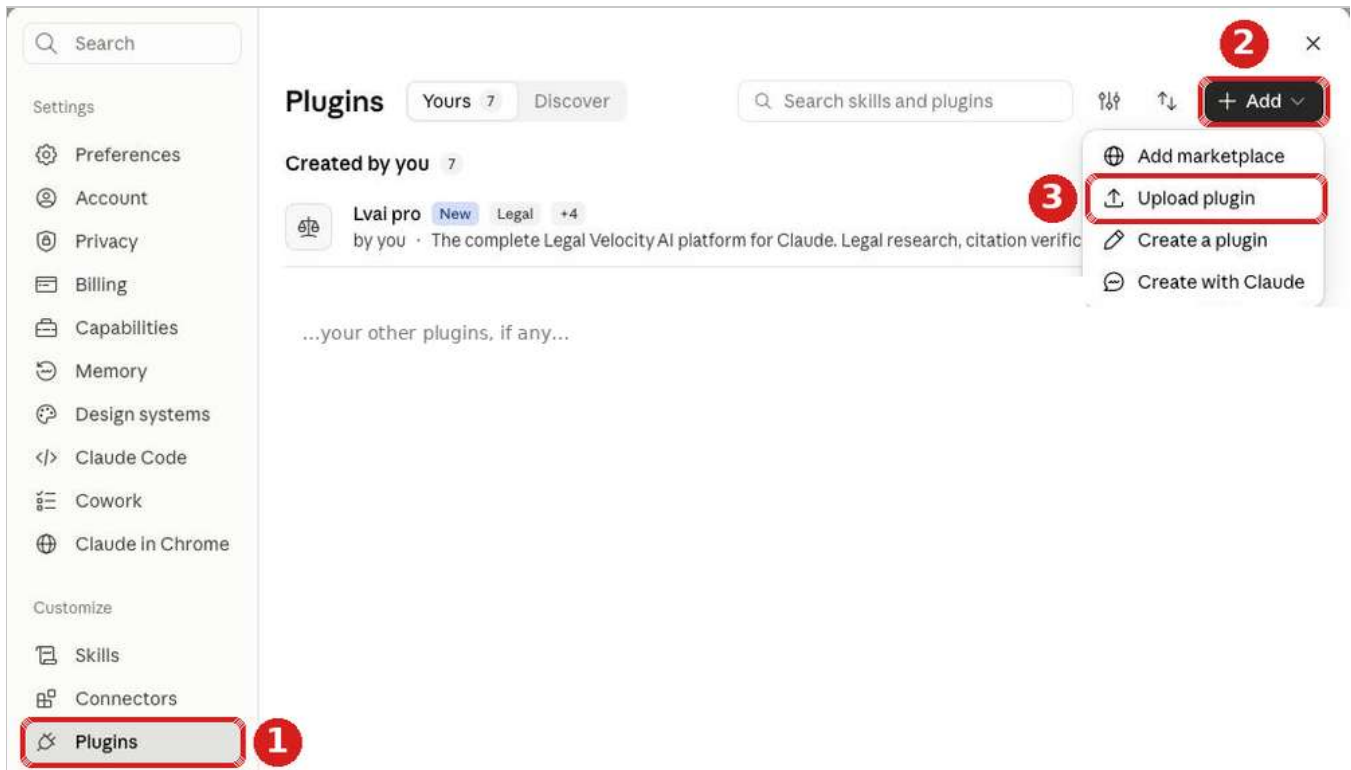
If no code arrives: the address must be the one on your license — the mailbox your setup email came to. A different address (a personal Gmail, a colleague's) gets nothing, on purpose. Check spam, click **Send a new code** once, and if it still does not come, email admin@legalvelocity.ai from the license address. **If the connector later shows "Reconnect":** click it and sign in again the same way — it takes thirty seconds.

Install the LVAI Pro plugin

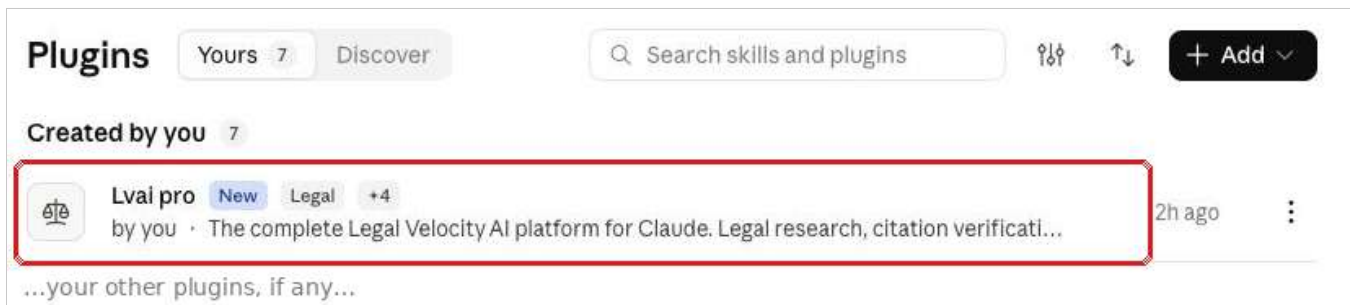
Goal: the LVAI Pro commands (`/research`, `/verify`, `/binder` ...) appear in Claude's message box.

You need: the same setup email — it has a button that downloads the plugin file.

- 1 *Shortcut, once LVAI Pro is in Claude's directory:* in Claude Desktop open **Settings** → **Plugins** → the **Discover** tab, search `LVAI Pro` and click **Install** — then skip to step 5. Otherwise, in your setup email, under "**Step 2 — Install the LVAI Pro plugin**", click the blue button **Download lvai-pro.plugin**. The file `lvai-pro.plugin` lands in your **Downloads** folder. (If the browser asks whether to keep the file, click **Keep**.)
- 2 In Claude Desktop, open **Settings** (your initials, bottom-left → **Settings**) and, under **Customize**, click **1 Plugins** (picture 14).
- 3 **Do you already see an older "LVAI Pro" or "Legal Velocity" plugin in the list?** Remove it first: open the plugin → ⋮ → **Remove**, then install the new file as in the next steps.
- 4 Click the black **2 + Add** button at the top right, then **3 Upload plugin** in the menu that drops down.
- 5 A file window opens. Go to **Downloads**, click `lvai-pro.plugin` once, and click **Open**.
- 6 Claude installs it. If it asks "Install this plugin?", click **Install**. The row **LVAI Pro** now appears in your list (picture 15).



Picture 14. 1 Plugins, under Customize · 2 + Add · 3 Upload plugin.



Picture 15. Installed: LVAI Pro in your plugins list.



Checkpoint. LVAI Pro is in the list on the **Yours** tab of the Plugins page. Close the settings window (the × at the top right).



Shortcut. On most computers you can simply double-click `lvai-pro.plugin` in your Downloads folder, or drag it onto the Claude Desktop window; Claude then asks to install it. If nothing happens, use the steps above.

i

Updates. When Legal Velocity releases a new version, you receive an email with the subject "LVAI Pro update: <title>" — with a new download button when the plugin file itself changed. Install it exactly the same way: open the plugin → ⋮ → Remove, then install the new file. The plugin is the same file for every customer — it contains only the command names; the actual skills come through your connector, so you always have the latest version without doing anything. The current file is always at <https://lvai-license-server.legalvelocity.workers.dev/public/lvai-pro.plugin> (Part 4, Chapter 34).

Check that everything works

Goal: a two-minute test that proves the connector, the plugin and your license are all in place.

1

In Claude Desktop, start a new conversation: click **New chat** at the top of the left sidebar (or the pencil-and-square icon).

2

Click in the message box and type this, then press **Enter**:

Type this (or copy and paste it):

Check my LVAI Pro license status

3

Claude may show a small box asking whether it may use the **Legal Velocity** connector's *license_status* tool. Click **Allow** (or "Allow always" — it is safe, and you will not be asked again).

4

Within a few seconds Claude replies with your license: **your name** (and firm), a **License ID** like `LV-XXXX-XXXX`, your **plan**, the date it is **valid through**, and **status: active** — followed by the billing line for your kind of license (Part 3, Chapter 31 explains each one).



Checkpoint. Claude showed your licensee name and "active". **Part 1 is complete.** You never need to do it again on this computer.

i

Did Claude say something else?

- "LVAI Pro needs the Legal Velocity connector" or "I don't have a *license_status* tool" → the connector is missing or switched off. Redo Chapter 6, then see Part 2, Chapter 11 (switching connectors on for a chat).
- "expired", "unpaid" or "deactivated" → your license needs attention; the message includes what to do, or email admin@legalvelocity.ai.
- Claude answers in general terms and never mentions a license → the plugin is not installed (Chapter 7) — or try typing `/license` instead (see Part 2, Chapter 12).



Second computer? Everything in Chapters 5–7 is stored in your Claude account, not on the computer — connectors and plugins follow you. On a second computer you only need to install Claude Desktop (Chapter 3) and sign in.

PART 2

Working in Cowork

Part 1 was done once. **Part 2 is what you do every time you work on a matter:** start Cowork, point it at the case folder, make sure the connectors are switched on, and run a command. Four chapters, about ten minutes to read; two minutes to do once you know it.

The routine, in one line

Cowork → **Project or folder** → **Add folder** (your case folder) → **+** → **Connectors** (switched on) → type */* and pick a command → say what you want → **Enter**.

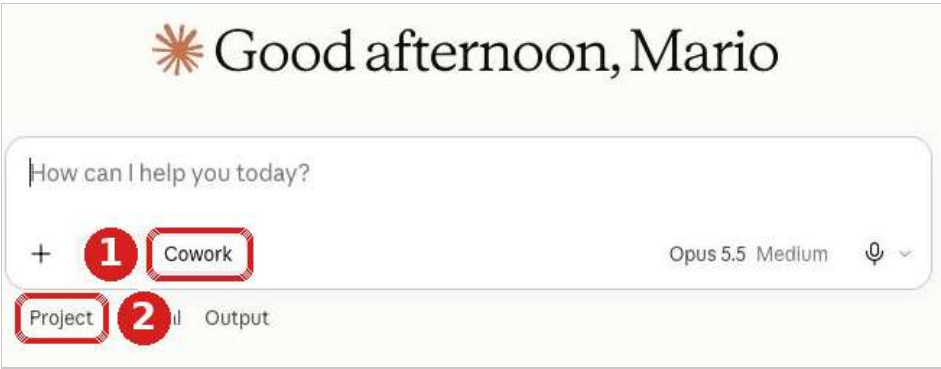
What Cowork is, and how to start it

Claude has two ways of working:

	Chat	Cowork
What it is	A conversation. You type, Claude answers.	Claude works inside a folder on your computer : it reads the files in it, does the job (which can take minutes) and saves the finished documents back into that folder.
Use it for	Quick questions. Checking your license.	Everything in LVAI Pro that involves a document: verifying a brief, building a binder, filling a form, merging exhibits, closing documents.

Starting a Cowork session

- 1 Open **Claude Desktop** (Part 1, Chapter 3). You see the home screen with the big message box.
- 2 Directly under the message box there are two small buttons, **Chat** and **Cowork**. Click **1 Cowork** (picture 16). It turns dark to show it is selected.
- 3 A thin bar appears under the box with three items: **2 Project or folder**, **Manual** (the approvals button, Chapter 12 B) and **Output**. That bar is where you choose your case folder (next chapter).



Picture 16. **1** the Cowork button under the message box · **2** the folder chooser that appears (in Claude Desktop it reads **Project or folder**).



Checkpoint. "Cowork" is highlighted and the **Project or folder | Manual | Output** bar is showing.

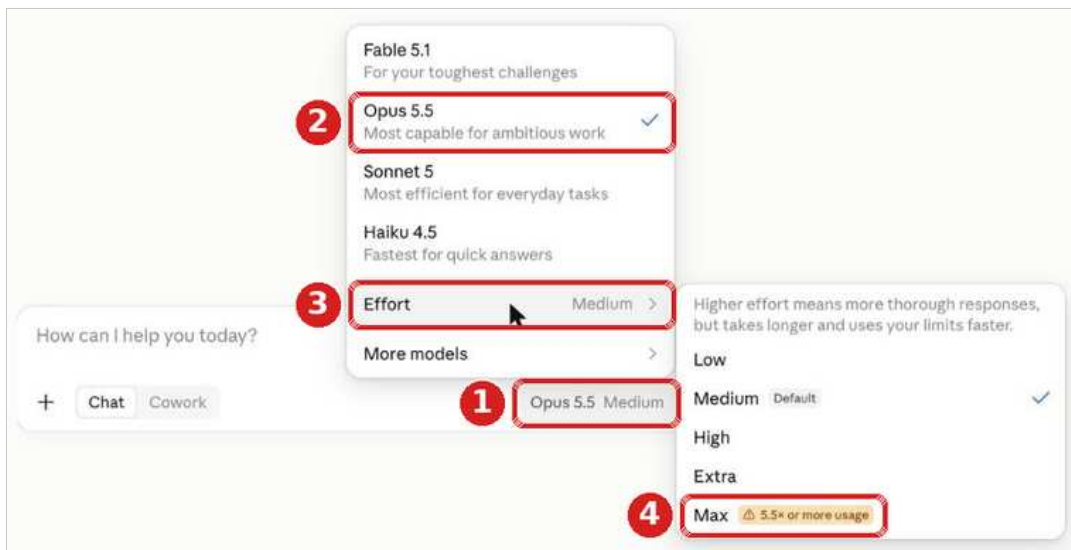


Older versions of Claude Desktop show **Cowork** as its own item in the left sidebar instead of a button under the message box. Click it there — everything else is the same.

Choose the model: Opus 5.5 at Max effort

Legal Velocity AI recommends **Opus 5.5** with the effort set to **Max** for complex legal work: research, verification, citation binders, corrections and drafting. Claude's own menu explains the trade-off: higher effort means more thorough responses, but takes longer and uses your limits faster.

- 1 At the right end of the message box, click the model button **1** (picture 17). It shows the model and the effort in use, for example **Opus 5.5 Medium**.
- 2 Click **2 Opus 5.5**.
- 3 Point to **3 Effort** and click **4 Max**. The button now reads **Opus 5.5 Max**.



Picture 17. **1** the model button · **2** Opus 5.5 · **3** Effort · **4** Max. The same button is there in Chat and in Cowork.



Checkpoint. Before a long job, the button at the right of the message box reads **Opus 5.5 Max**.



Max uses more of your Claude plan. The menu marks Max "5.5× or more usage". On the **Pro** plan, a long binder or verification at Max can reach Claude's usage limit before it finishes; if you run LVAI Pro at Max every day, the **Max** plan is the comfortable choice (Part 1, Chapter 2). If you do reach the limit, Claude tells you when it resets; you can also switch the effort to **High** or **Extra** and type "*continue*". Quick tasks (checking your license, filling a form, merging exhibits) run well at a lower effort.

Your case folder — where the work happens

Goal: one folder on your computer per matter, containing the files Claude should use, chosen in Cowork.

Why: LVAI Pro reads from that folder (your brief, your exhibits, the contract) and writes into it (the verification report, the binder, the filled form). If the file is not in the folder, Claude cannot see it.

A. Make the folder (once per matter)

1

Mac: open **Finder** → click **Documents** in the left column → menu **File** → **New Folder** → type a name such as `Smith v Jones` → press **Return**.

Windows: open **File Explorer** → click **Documents** → right-click an empty spot → **New** → **Folder** → type the name → press **Enter**.

2

Copy the files Claude will need into that folder: the brief to verify, the exhibits, the contract and rider, the title binder, the PDF form — whatever the command in Part 3 says it needs. Drag them in from wherever they are, or download them from your email into this folder.

3

Give files names that say what they are: `Brief - MSJ.docx`, `Exhibit A - Contract of Sale.pdf`. Claude reads the names too.



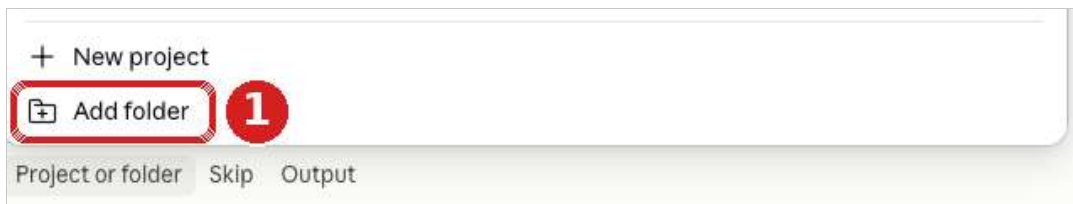
Good habits. One folder per matter — never your whole Documents folder or your Desktop (Claude would have to read hundreds of files). Keep originals elsewhere if you like; Claude never changes a file you gave it without saying so, but the finished documents are saved next to them, so a tidy folder helps. Folders in iCloud, OneDrive or Dropbox are fine **as long as the files are actually downloaded** to your computer (no cloud icon next to them).



A hidden folder appears. The research and verification commands write a hidden folder named `.lvaipro` into your case folder, holding the verification ledger of each run (which authorities were found, where, and what was checked) — it is the audit trail behind the integrity check, it is harmless, and you can leave it there or delete it after the matter closes.

B. Choose the folder in Cowork (every session)

- 1 With **Cowork** selected (Chapter 9), click **Project or folder** in the thin bar under the message box.
- 2 A small menu opens (picture 18). Click **1 Add folder**.
- 3 A file window opens. Find your folder (Documents → **Smith v Jones**), **click it once** to select it, and click **Open** (Windows: **Select Folder**). Do not open the folder and select a file inside it — select the folder itself.
- 4 If Claude or your computer asks whether Claude may access the folder, click **Allow**.
- 5 The name of your folder now appears in the bar in place of "Project or folder".



Picture 18. The menu behind **Project or folder**. **1** Add folder — pick the case folder you made in step A. (The middle button of the bar is the approvals button; it shows the setting chosen on the computer where the picture was taken. Yours reads **Manual** until you change it — Chapter 12 B.)

✓ **Checkpoint.** The bar under the message box shows the name of your case folder.

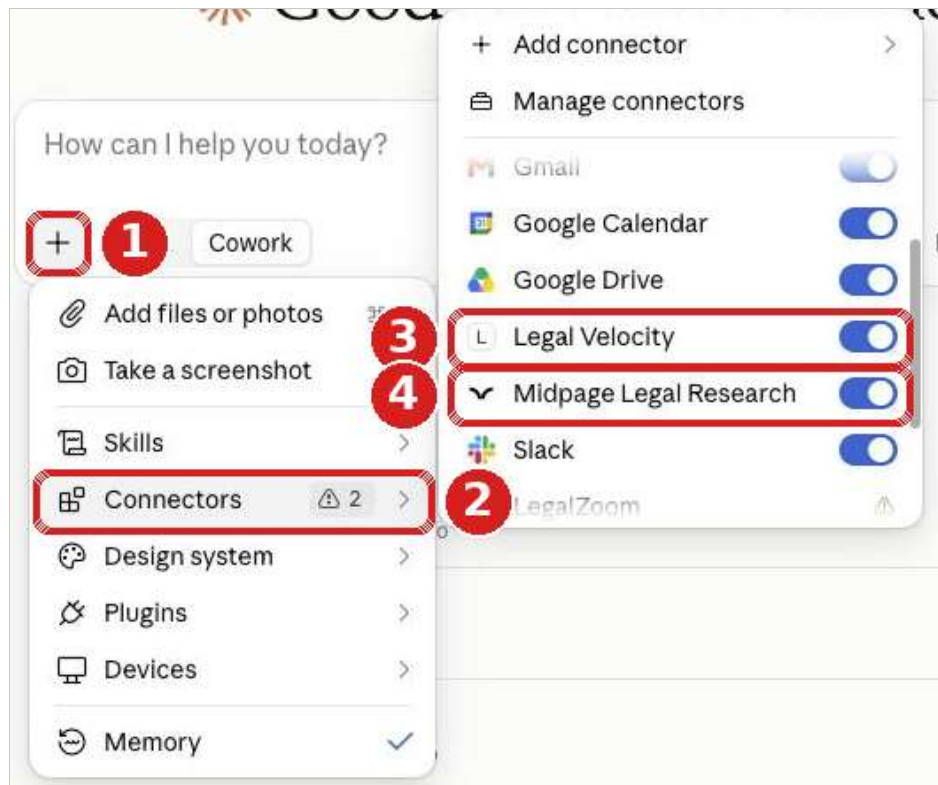
i **Next time.** Claude remembers folders you have used: click **Project or folder** and the folder is in the list — click it. **Output** in the same bar chooses the format for things Claude writes in the chat itself (Docs, Slides...); leave it on its default — LVAI Pro saves real Word and PDF files into your folder regardless.

Make sure the connectors are switched on

Goal: the Legal Velocity connector and your research connector are switched on for this chat.

Why: a connector can be installed (Part 1) but switched off for a particular conversation. If Claude ever says "*LVAI Pro needs the Legal Velocity connector*" even though you installed it, this is the fix.

- 1 Click the **1** + button at the left end of the message box (picture 19).
- 2 In the menu, click **2 Connectors**. A second list slides out showing every connector with an on/off switch.
- 3 Make sure the switch next to **3 Legal Velocity** is **on** (blue). If it is grey, click it.
- 4 Make sure **4 Midpage Legal Research** (or **Describe Legal Engine**) is **on** as well.
- 5 Click anywhere outside the menu to close it. The switches stay as you set them for future chats.



Picture 19. 1 the + button · 2 Connectors · 3 Legal Velocity on · 4 your research service on.



Fewer is better. Switch **off** connectors you don't need for legal work (Gmail, Slack and so on). Claude then has fewer tools to think about and works faster.

Running a command

Goal: you know how to start any LVAI Pro command, what to tell it, how to answer its questions, and where the result ends up.

A. Start the command

- 1 Click in the message box and type a forward slash: `/` — a list of commands pops up above the box.
- 2 Keep typing `lvai-pro` so the box reads `/lvai-pro` (picture 20). The list now shows **only the LVAI Pro commands**: draft, verify, intake, binder, license, correct, research, discovery, hyperlink, fill-form ... (scroll the list to see all twenty).
- 3 Click the command you want. The box now reads, for example, `/lvai-pro:verify`. (You can also type the whole thing yourself: `/lvai-pro:verify` — the name after the colon is what matters.)
- 4 Press the **space bar** and write, in plain English, what you want and which file to use. Examples:

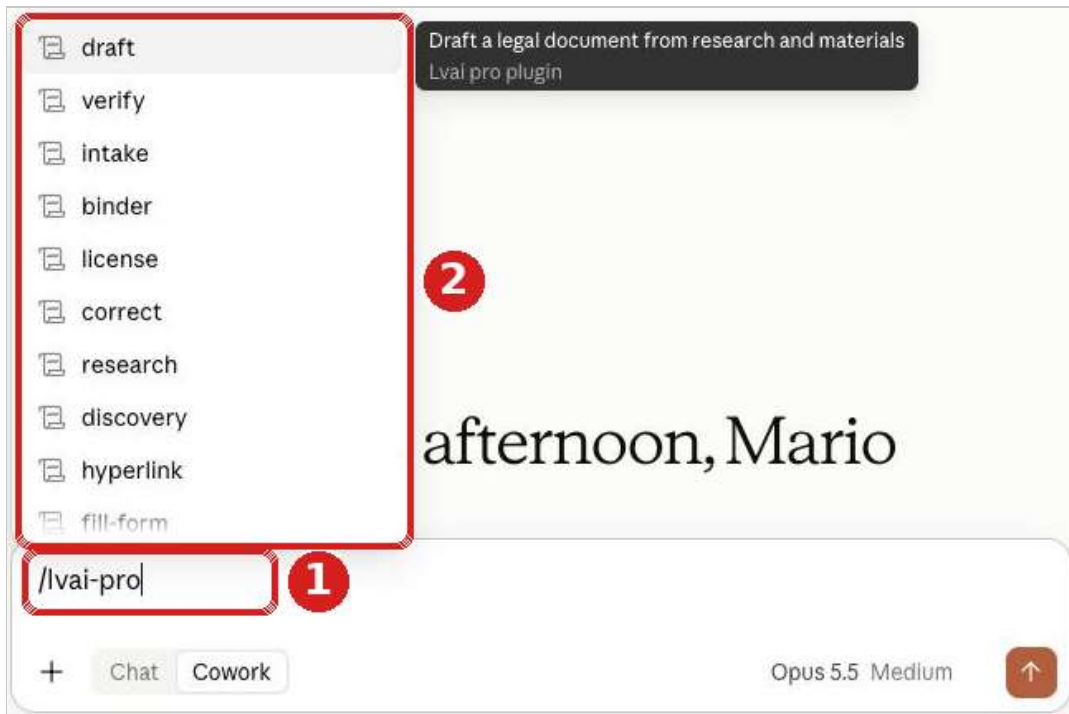
Type this (or copy and paste it):

```
/lvai-pro:verify check every citation in "Brief - MSJ.docx"
```

Type this (or copy and paste it):

```
/lvai-pro:exhibit-binder make one PDF of the files in the Exhibits
folder, in the order they are numbered, letters A B C, for the
motion for summary judgment in Smith v. Jones
```

- 5 Press **Enter**. Claude starts working.



Picture 20. 1 type /lvai-pro in the message box · 2 the LVAI Pro commands appear; click one. Hovering over a command shows a one-line description.



You don't have to remember the commands. If you simply write "*verify the citations in my brief*" or "*merge the exhibits into one PDF*", LVAI Pro picks the right command by itself. The slash command is just the sure way.

B. Approvals — how much Claude asks before it acts

In the thin bar under the message box there is a button that reads 1 **Manual** (picture 21) — its label always shows the setting currently chosen. It controls whether Claude asks your permission before it uses a connector or writes a file:

- 2 **Manually approve** — Claude stops and asks "Allow?" for each action. Safest; but a binder can involve dozens of connector calls, and you will be clicking **Allow** a lot.
- **Automatically approve** — Claude does the whole job without asking. Recommended for LVAI Pro once you have run a command or two: everything it does stays inside your case folder and your connectors.
- **Skip all approvals** — like Automatically approve but also for things outside the folder. Not needed for LVAI Pro.



Picture 21. 1 the approvals button · 2 Manually approve is the default.

C. While Claude works

- Claude writes short progress notes ("Reading the brief...", "Verifying citation 4 of 12..."). A verification or binder typically takes **5 to 20 minutes**; research 3 to 10; an exhibit binder or a filled form 1 to 5. Leave the window open; you can use other programs.
- If Claude **asks you a question** ("Which labels do you want — letters or numbers?", "Which of these two cases did you mean?"), type the answer in the message box and press **Enter**. It waits for you.
- If a small **Allow?** box appears (Manual approvals), read what it wants to do and click **Allow**.
- To stop a run, click the **stop** square where the send button was.

D. Where the result is

- When Claude finishes, its last message summarises what it did and shows **links to the files it created**. Click a link to open the file in Word, Acrobat or Preview.
- The same files are in your **case folder** (Finder / File Explorer), named as the command's chapter in Part 3 says — for example
 Citation Verification Report - Smith v Jones.docx. Your original files are untouched. (A hidden .lvai folder with the run's verification ledger is written next to them — Chapter 10.)
- Not happy with something? Just say so in the same chat: *"use numbers instead of letters"*, *"the caption should say Hudson County"*. Claude redoes it.

! **You are the lawyer.** LVAI Pro verifies every citation it uses against the real opinion and refuses to deliver a document that fails that check — but nothing replaces your reading the result before it goes to a court or a client. Every chapter in Part 3 ends with what to check.

E. Six habits that make everything work better

1. **One matter, one folder, one chat.** Start a new chat for a new matter; Claude remembers everything said in a chat.
2. **Put the files in the folder before you start**, and name them clearly.
3. **Say what the document is for** ("opposition to a motion to dismiss in the Law Division, Hudson County") — the output is tuned to it.
4. **Answer questions in the chat**; don't start a new one.
5. **Read the delivery note.** It lists anything Claude could not verify or had to leave out.
6. **Opus 5.5 at Max for the big jobs.** Glance at the model button before research, verification, a binder or a draft (Chapter 9).

PART 3

The commands, one by one

Twenty commands, one chapter each (the two exhibit commands share a chapter). Every chapter has the same shape: **what it does**, **what you need in the folder**, **the steps**, **what you get back** (with a picture of a real result), **what to check**, and **what can go wrong**. You do not need to read them all — go to the chapter for the job in front of you.

Command	What it does	Needs Midpage / Descrybe?	Chapter
Research and verification			
/research	Research a legal question; every case verified against the real opinion	Yes	13
/deep-research	The same, exhaustively — reads targeted passages of 8–12 leading opinions	Yes	14
/case-summary	A structured brief of one court opinion	Yes	15
/verify	Check every citation and claim in a brief → Citation Verification Report	Yes	16
/correct	Fix what /verify flagged, in a copy of the brief, then re-verify	Yes	17
/binder	A Citation Binder (Word) with a tab and verified pull-quotes for every authority	Yes	18
/hyperlink	Make every citation in a Word document clickable	Yes	19
Drafting and filing			
/draft	Write a brief, motion, memo, opposition or complaint from your materials	Recommended	20

Command	What it does	Needs Midpage / Descrybe?	Chapter
/discovery	Interrogatories, requests for production, requests for admission — or responses	No	21
/exhibit-binder	Merge exhibits into one tabbed, indexed, page-numbered PDF	No	22
/exhibits	The exhibits a certification or affirmation refers to — matched to the files, checked, tabbed and merged behind it	No	22 C
Real estate (New Jersey and New York)			
/intake	Start a transaction from the contract and rider	No	23
/prepare-rider	A buyer's or seller's rider (residential, condo or co-op)	No	24
/calendar-dates	Put every critical date of the deal on your calendar	No (needs a calendar connector)	25
/title-review	Review a title binder or commitment; offers the seller's closing documents	No	26
/closing-docs	Deed, affidavits, closing statement and the state tax forms, filled in	No	27
Forms and data			
/analyze-form	List every fillable field of a PDF form	No	28
/fill-form	Fill a PDF form (a CIS, a court form) from the documents in your folder	No	29
/extract-data	Pull the financial and personal data out of tax returns, paystubs, statements	No	30
Account			
/license	Show your license, expiry and status, with the billing link that applies to your plan	No	31

i

The litigation workflow, start to finish. `/research` the question → `/draft` the brief from the research → `/verify` the draft → `/correct` what was flagged → `/binder` for the judge's chambers and your file → `/hyper link` the version you e-file → `/exhibit-binder` for the exhibits. Each chapter says which command comes next.

/research — research a legal question

What it does: researches a legal issue on your research service, **verifies every case it wants to cite against the actual opinion** (the case exists, it says what it is cited for, and any negative or cautionary treatment on your research service is flagged), and writes a memo-style analysis with Bluebook citations, each linked to the opinion. The memo is always **written to a file in your case folder** — `Research memo - <topic>.md` — and that file must pass the integrity check before Claude shows you anything; there is no chat-only answer that skips the check.

Needs: Midpage or Descrybe connected (Part 1, Chapters 4–5). If you connect both Midpage and Descrybe, every research command — `/research`, `/deep-research`, `/case-summary`, `/verify`, `/correct`, `/binder`, and `/draft` when it researches — checks every authority, holding, quotation and treatment on both services and tells you where they disagree. Links go to Midpage (Descrybe links only if you ask). **Files needed:** none — but if you have a complaint, a contract or facts in the folder, say so and Claude reads them.

Time: 3–10 minutes. **You get:** `Research memo - <topic>.md` in your case folder (it opens in Word or any text editor; say "save it as Word" for a `.docx` as well), and a summary with the memo's link in the chat.

Step by step

- 1 Start Cowork and choose the case folder (Part 2, Chapters 9–10). For pure research the folder can be empty — but you must choose one: the memo is written into it before you see it.
- 2 Type `/lvai-pro:research`, a space, and your question. Include the **jurisdiction**, the **posture** (motion to dismiss? summary judgment? appeal?) and the **facts that matter**. The more specific the question, the better the answer.

Type this (or copy and paste it):

```
/lvai-pro:research In New Jersey, when may a trial court grant
summary judgment where the parties dispute some facts? What showing
must the non-moving party make on an element on which it bears the
burden of proof? This is for a Law Division motion. Save the memo as
a Word document in my folder.
```

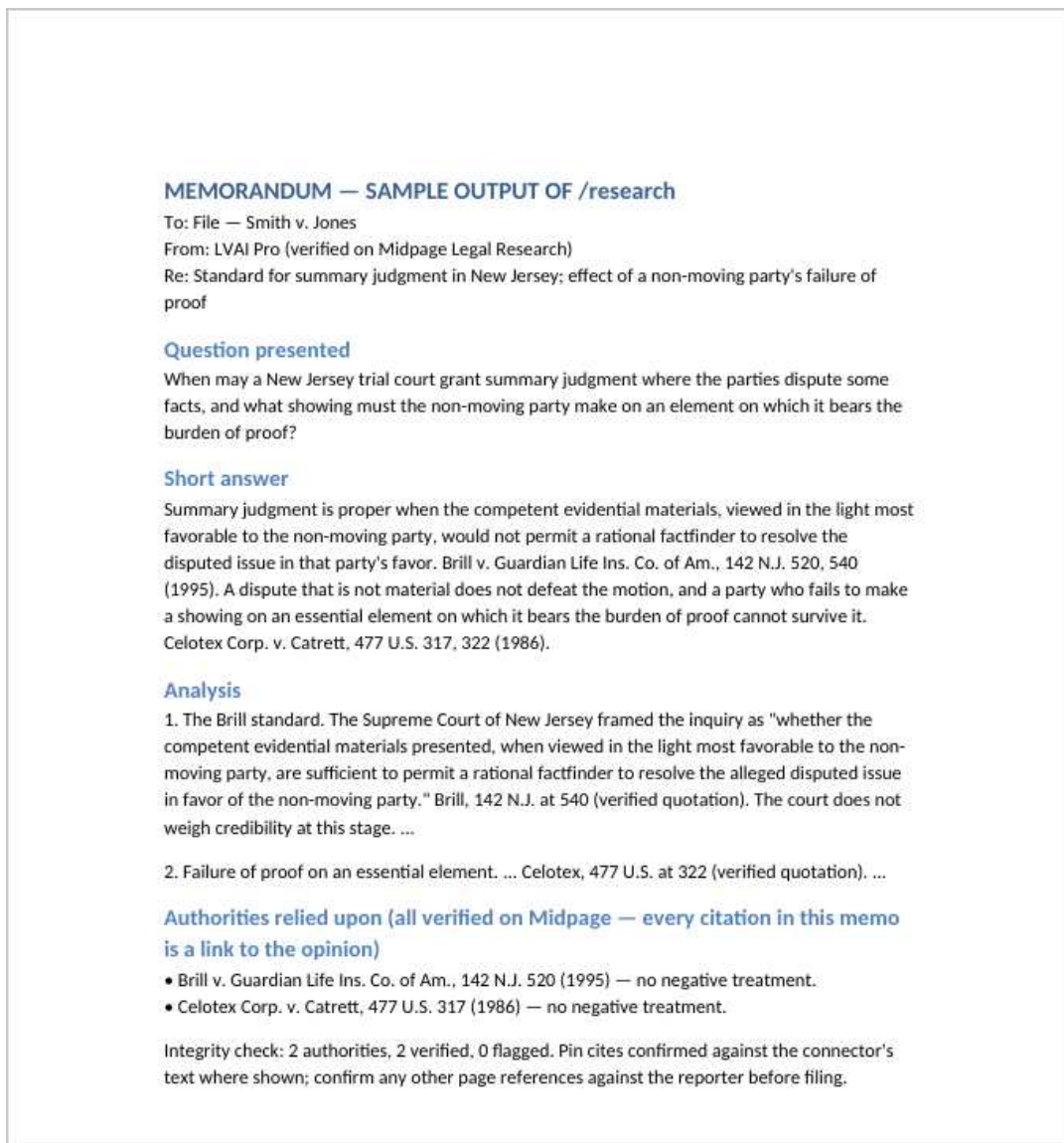
3

Press **Enter**. Claude searches, reads the opinions, checks each one and writes. If it asks a question (for example, which state's law applies), answer it in the chat.

4

Claude writes the memo to `Research memo - <topic>.md` in your folder, runs the integrity check on that file, and only then shows you the result: a summary in the chat with the memo's link at the end. If you asked for a Word file as well, its link is there too.

What you get



Picture 22. A research memo produced by /research, saved as Word: question presented, short answer, analysis with pinpoint citations, and the list of authorities — every one verified on the connector, with a link to the opinion.

- Every case is a real case, located on Midpage or Descrybe, and its holding checked against what the memo says. Cases that could not be verified are **not** cited — the memo says so instead.

- Every case is looked up **twice**: before the memo reaches you, a separate sub-agent — given only the list of cited cases, never the memo — looks each one up again, and the integrity check confirms that the two lookups agree.
- The delivery note ends with the integrity line, which tells you which service was used: *"Integrity check: PASS — N authorities verified on Midpage"* (or Descrybe). With both services connected it reads *"Cross-checked on Midpage and Descrybe: ..."* and lists what was found on both, what only one service could confirm, any treatment warnings and any disagreement.
- The check also confirms each case's **name and year** against the verified record, block quotations (indented quotes), short-form citations (*"Brill, 142 N.J. at 540"*), "In re" / "Matter of" cases and quotations marked "(citation omitted)". Subsequent history ("certif. denied ...") is written only when the service confirmed it, and a reporter the check does not recognise is flagged rather than passed.
- Quotations are word-for-word from the opinion text the connector returned. Where a page number could be confirmed it is given; where it could not, the memo says so rather than guessing.

Check before you rely on it

- Open two or three of the linked opinions and read the passages yourself — the links are there for this.
- Pin cites not marked as verified must be confirmed against the reporter before they go into a filing.
- Treatment ("no negative treatment") is as of the day the research was run.

Ask for more

Type this (or copy and paste it):

Add the federal standard under Rule 56 and note where it differs.

Type this (or copy and paste it):

Find two more Appellate Division cases from the last five years on the same point.

Type this (or copy and paste it):

Turn this into a memo to the file, addressed to the partner, and save it as Word.

If something goes wrong

Claude says...	Do this
"LVAI Pro needs the Legal Velocity connector"	Part 2, Chapter 11 — switch it on. If it is not in the list at all, Part 1, Chapter 6.
"No legal-research connector is available" / it cannot find Midpage or Descrybe	Part 2, Chapter 11 — switch it on; or Part 1, Chapter 5 if it was never connected. If the connector shows Reconnect in Settings → Connectors, click it and sign in again.
It cites nothing, or says it found nothing on point	Your question may be too narrow or the wrong jurisdiction. Rephrase, or use <code>/deep-research</code> (next chapter).
"daily limit" or "license expired"	Chapter 31, <code>/license</code> — the reply shows the billing line for your kind of license: the manage-billing link on the primary seat of a subscription, the upgrade link for a complimentary license, or "Renewals and support: admin@legalvelocity.ai" for a hand-issued license. The daily limit resets at midnight UTC.

Next: `/draft` (Chapter 20) to turn the research into a document; `/deep-research` (Chapter 14) if the issue is novel or the stakes are high.

/deep-research — exhaustive research on the leading opinions

What it does: the same as /research, but it runs several searches from different angles, triages the results, **reads targeted passages of the 8–12 leading opinions** (every case it cites is verified first), and writes a comprehensive analysis: the rule, how courts have applied it, splits and trends, and the strongest and weakest authority for each side.

Needs: Midpage or Descrybe (with both, cross-check mode — Chapter 13). **Time:** 10–30 minutes. **Use it for:** an appellate brief, a novel issue, "everything on this point", or when /research came back thin. **You get:** as with /research, the analysis is written to `Research memo - <topic>.md` in your case folder and passes the integrity check before you see it (ask for Word and you get a `.docx` as well).

Step by step

1

Cowork → case folder (Part 2). If you have the complaint, the order you are appealing from or an earlier memo, put them in the folder and mention them.

2

Type `/lvai-pro:deep-research`, a space, and the question — with jurisdiction, posture, the facts that matter and what you already know.

Type this (or copy and paste it):

```
/lvai-pro:deep-research New Jersey. Whether a residential seller's failure to disclose a known basement water problem supports a claim under the Consumer Fraud Act as well as common-law fraud, and what the buyer must prove for each. We represent the buyer; the seller has moved for summary judgment. The complaint and the seller's brief are in the folder. Save the analysis as a Word document.
```

3

Press **Enter** and let it run. It is normal for this to take twenty minutes; the progress notes tell you where it is ("Reading opinion 6 of 14...").

4

Read the analysis. The authorities section lists every case with its treatment and a link.

What you get

- A long-form analysis: the governing rule with its source; how the leading cases apply it, with verified quotations; the cases that cut the other way and how they are distinguished; and a conclusion for your posture.
- Every case verified on the connector and linked; anything that could not be verified is named as such and not relied on.

Check before you rely on it

- As for /research (Chapter 13). For an appellate brief, read every opinion the analysis calls "leading".

Next: `/draft` (Chapter 20); `/case-summary` (Chapter 15) for a full brief of any single case the analysis turned up.

/case-summary — brief one court opinion

What it does: finds one specific opinion on your research service, reads it, and writes a structured case brief: overview, procedural history, facts, issues presented, holdings, reasoning, significance, current treatment (has it been followed, distinguished, overruled?) and how it applies to your matter.

Needs: Midpage or Descrybe (with both, cross-check mode — Chapter 13). **Time:** 2–5 minutes. **Files:** none, unless you have the opinion as a PDF — then put it in the folder and say so. **You get:** `Research memo - <case name>.md` in your case folder.

Step by step

1 Cowork → case folder.

2 Type `/lvai-pro:case-summary`, a space, and the case — by name and citation if you have it, or just the name and the court. Say what you are using it for.

Type this (or copy and paste it):

`/lvai-pro:case-summary Brill v. Guardian Life Insurance Co. of America, 142 N.J. 520 (1995). I am opposing a summary-judgment motion; focus on what the non-moving party must show.`

3 Press **Enter**. If several cases match the name, Claude lists them and asks which one — answer with the number or the citation.

What you get

- The brief, in the order listed above, written to the memo file and passed through the integrity check (Chapter 13) before Claude shows it.
- Quotations are from the opinion text the connector returned; the opinion is linked at the top. Ask "save *this* as Word" to get a `.docx` as well.

Check before you rely on it

- "Current Treatment" is the connector's citator data on the day you ran it. Before citing the case in a filing, run `/verify` on the filing (Chapter 16) — it checks treatment again.

/verify — check every citation in a brief

What it does: reads your brief, motion or memorandum, lists **every** case and statute it cites and the proposition each is cited for, finds each case on Midpage or Descrybe, and compares what your brief says the case holds with what the opinion actually says. It checks every quotation, follows negative treatment into the later cases, and checks each statute against its text. Before the report reaches you, a separate sub-agent looks every case up a second time, and the integrity check confirms that no citation in the brief was left out. The result is a **Citation Verification Report** that opens with an **At a glance** table and ends with a **verification certificate** — and for each citation gives the proposition in your brief, the verified language from the opinion, a pin-cite line, links, and a status: **VERIFIED**, **OVEREXTENDED**, **HOLDING INACCURATE**, **CITATION ERROR**, **NOT FOUND**, or **CAUTION** (each is explained under "What you get").

Needs: Midpage or Descrybe. If you connect both Midpage and Descrybe, every research command — /research, /deep-research, /case-summary, /verify, /correct, /binder, and /draft when it researches — checks every authority, holding, quotation and treatment on both services and tells you where they disagree. Links go to Midpage (Descrybe links only if you ask). **Files:** the brief, as `.docx` or `.pdf`, in the folder (from a PDF, the text is extracted first). **Time:** 5–20 minutes, depending on the number of citations. **You get:** `Citation Verification Report - <matter>.docx` in the folder — a Word document; also a PDF when LibreOffice is installed — and the same findings as a spreadsheet, `Citation Verification Report - <matter>.csv`.

? Why this matters. Courts sanction lawyers for citing cases that do not exist or do not say what the brief claims. /verify is the check that catches both — run it on every document you file, and on every document you receive from the other side.

Step by step

- 1 Put the brief in your case folder (Part 2, Chapter 10). Word format is best; a PDF brief works too — its text is extracted first, so a scanned PDF (a picture of text) will not do.
- 2 Cowork → choose that folder → connectors on (Part 2, Chapters 9–11).

3

Type `/lvai-pro:verify`, a space, and name the file:

Type this (or copy and paste it):

```
/lvai-pro:verify check every citation in "Brief - MSJ.docx"
```

To check the other side's brief, it is exactly the same:

Type this (or copy and paste it):

```
/lvai-pro:verify verify all the citations in "Defendant's  
Brief.pdf" and tell me which propositions the cases do not actually  
support
```

4

Press **Enter** and wait. Claude reports progress ("12 citations found — verifying 3 of 12..."). Near the end it starts a separate sub-agent for the second lookup of every case — that is expected. Do not close the window.

5

When it finishes, the delivery note in the chat gives the counts — *"12 citations checked — 10 verified, 2 issues"* — and then, line by line: with both services connected, which service confirmed what; *"Coverage: 12 of 12 citations in the brief are in the report"*; *"Independent re-lookup: 12 of 12 confirmed (sub-agent)"*; the integrity line; a reminder to confirm pin cites against the reporter; the names of the flagged cases; and any statute that could not be checked. The links to the report, its PDF and its CSV follow. Open the report.

What you get

Citation Verification Report
Brief in Support of Motion for Summary Judgment (Smith v. Jones)

3 citation(s) checked 2 verified 1 issue(s)
2 verified - 1 overextended

At a glance

#	Authority	Where in the brief	Status	Finding
1	Brill v. Guardian Life Insurance Co. of America, 142 N.J. 520 (1995)	Point I, ¶ 2	VERIFIED	Supported
2	Celotex Corp. v. Catrett, 477 U.S. 317 (1986)	Point I, ¶ 4	VERIFIED	Supported
3	Brill v. Guardian Life Insurance Co. of America, 142 N.J. 520 (1995)	Point II, ¶ 1	OVEREXTENDED	OVEREXTENDED — Brill does not say the motion 'must' be granted whenever the moving party's version is more persuasive; the court may not weigh credibility or decide which version is more persuasive at the summary-judgment stage.

Each citation below pairs the proposition the document attributes to the case with the verified case-language counterpart from the research connector. Click any citation to open the full opinion. Issues are flagged in red.

1. Brill v. Guardian Life Insurance Co. of America
142 N.J. 520 (1995) [\[open on Midpage\]](#)
Found on: Midpage
VERIFIED

Claim 1.1 (Point I, ¶ 2)
Proposition in brief: Summary judgment is proper where the evidence, viewed most favorably to the non-moving party, would not permit a rational factfinder to find for that party.
Verified case language: "whether the competent evidential materials presented, when viewed in the light most favorable to the non-moving party, are sufficient to permit a rational factfinder to resolve the alleged disputed issue in favor of the non-moving party."
Pin cite: 142 N.J. at 540 (from the opinion's own page markers)

Citation Verification Report - Page 1 of 2

Picture 23. The report's first page: document name, how many citations were checked, then each citation with the brief's proposition and the verified case language.

The report is a Word document (also a PDF when LibreOffice is installed). From front to back:

- **At a glance.** Right after the title and the counts ("12 citation(s) checked", "10 verified", "2 issue(s)", then the number for each status), one table lists every authority: its number, the case and citation, where it is in the brief ("Point II, ¶ 1"), its status in color, and the finding in a few words; the statutes follow, one row each. Read this page first — it tells you where the problems are.
- **One entry per citation**, in the order they appear in the brief, with its status, "Proposition in brief", "Verified case language" (word for word from the opinion), the links and the location in the brief. Statuses: **VERIFIED** — the opinion supports the proposition · **OVEREXTENDED** — real case, but the brief claims more than it holds · **HOLDING INACCURATE** — the case does not hold what the brief says · **CITATION ERROR** — real case, wrong volume, page or year · **NOT FOUND** — no such case (or citation) on the service · **CAUTION** — later cases have criticised, limited or overruled it.

2. Celotex Corp. v. Catrett
477 U.S. 317 (1986) [\[open on Midpage\]](#)
Found on: Midpage
VERIFIED

Claim 2.1 (Point I, ¶ 4)
Proposition in brief: A party who cannot make a showing on an essential element of its case, on which it bears the burden of proof, cannot survive summary judgment.
Verified case language: "against a party who fails to make a showing sufficient to establish the existence of an element essential to that party's case, and on which that party will bear the burden of proof at trial."
Pin cite: 477 U.S. at 322 (from the opinion's own page markers)

3. Brill v. Guardian Life Insurance Co. of America
142 N.J. 520 (1995) [\[open on Midpage\]](#)
Found on: Midpage
OVEREXTENDED

Claim 3.1 (Point II, ¶ 1)
Proposition in brief: Under Brill, any dispute of fact that is not material must be disregarded, and the motion must be granted whenever the moving party's version is more persuasive.
Verified case language: "the judge must ... consider whether the competent evidential materials presented ... are sufficient to permit a rational factfinder to resolve the alleged disputed issue in favor of the non-moving party."
Pin cite: 142 N.J. at 540 (from the opinion's own page markers)
Issue: OVEREXTENDED — Brill does not say the motion 'must' be granted whenever the moving party's version is more persuasive; the court may not weigh credibility or decide which version is more persuasive at the summary-judgment stage.

Quotes and propositions verified on the research connector. Click any citation above to read the full opinion.

Citation Verification Report - Page 2 of 2

Picture 24. An issue, flagged in red: the brief said the court "must grant" the motion whenever the moving party's version is more persuasive — the opinion does not say that. Status: OVEREXTENDED.

- **Pin-cite line.** Under each verified quotation: "Pin cite: 142 N.J. at 540 (from the opinion's own page markers)" — or, when no page could be confirmed, "Pin cite: not verified — neither research service returns reporter page numbers; confirm against the reporter before filing."
- **Passage links.** "[open passage on Midpage]" opens the opinion at the quoted passage. A Descrybe link opens the case, not the passage, and the report says so: "[open case on Descrybe — Descrybe links open the case, not the passage]". To find the passage there, use your browser's Find (**Ctrl F**; Mac: **⌘ F**) with a few words of the quotation.
- **Leads-to line.** When the brief's reporter citation opens a *different* case on the research service, the citation is NOT FOUND, with the words "Citation belongs to a different case" beside the status, and a red line names the case that citation actually opens: "Reporter citation leads to: <that case and its citation> — <a one-line description drawn from the research service> [open on Midpage]". A NOT FOUND entry has no court-attribution line, and its case-language line reads "(case not found on either service — nothing to compare)".
- **Quote check.** Every quotation in your brief gets a line beginning "Quote check:" with one of five results: **VERBATIM** — word for word in the cited opinion; **ALTERED** — the next line, "Brief's quotation:", shows your quotation against the court's text word by word (struck through in red: the brief's words; in green: the court's words); **IN ANOTHER CASE** — the words are real but come from a different opinion, which is named and linked; **NOT IN THE OPINION**; or **NOT FOUND ANYWHERE** — searched for across the research service's opinions (on both services when both are connected) and found nowhere.
- **Treatment and later cases.** "Treatment: Midpage — ...; Descrybe — ..." with a one-line summary, and "Subsequent history: ..." when the service returned it. Where later courts treated the authority negatively or with caution, "Later treatment:" lists up to three of those cases, each tagged **FOLLOWED**, **DISTINGUISHED**, **CRITICIZED**, **QUESTIONED**, **LIMITED** or **OVERRULED** from that court's own words — quoted, with a link to the passage. For the propositions the argument turns on, "Contrary authority:" lists real cases that go the other way, each verified and quoted. When there is later treatment, a **Treatment memo** near the end gathers it in one table.
- **Statutes and rules.** A section of its own: for each statute the brief cites, "Statement in brief", the statutory text (word for word from the research service — or, when the service does not carry that state's code, from **OneCLE's copy** of the code, printed with the date OneCLE last updated the page, or as quoted in an opinion, which is named), an issue line, and a status: **VERIFIED**, **MISSTATED**, **NOT FOUND** or **NOT CHECKED**. OneCLE's copies are old (its pages were last updated between 2006 and 2021), so a statute checked against one always says so, with the date, and tells you to confirm the current text before

filing. A NOT CHECKED statute carries a plain note saying why — for example, that neither research service nor Onecle carries that state's code (Tennessee and Mississippi, for instance).

- **Verification certificate** — the last page: the result (PASS), the research services used, how many authorities were verified and how many are listed as not verified, statutes checked and not checked, quotations matched to the source, coverage ("12 of 12 case citations; 2 of 2 statutes"), the independent re-lookup ("12 of 12 confirmed by a separate sub-agent") and SHA-256 fingerprints of the records behind the check. It ends with its limits: a mechanical integrity check, not a legal review.

Next to the report, in the same folder:

- `Citation Verification Report - <matter>.csv` — the findings as a spreadsheet, one row per claim and one per statute: the authority, citation, status, where it was found, where it is in the brief, the proposition, the issue, the quote check, the treatment, the leads-to case and the link. It opens in Excel.
- `Citation Verification Report - <matter>.manifest.json` — keep it with the report; /correct reads it.

Before the report reaches you:

- **The independent re-lookup.** Claude starts a separate sub-agent and gives it only the list of cited cases — never the report, never Claude's conclusions. The sub-agent looks each case up again on every connected service. If it finds a case the report calls NOT FOUND, or cannot find one the report calls verified, the report is corrected before you see it. If Claude cannot start a sub-agent, it does the second lookup itself after re-reading only the list, and the delivery note and the certificate say "same session".
- **The coverage check.** The integrity check compares the report with the list of every citation in your brief: a case or a statute missing from the report fails the check, and the report is fixed before it is delivered.
- The check goes beyond the citation itself: each case's **name and year** are compared with the verified record; block quotations (indented quotes), short-form citations ("*Brill*, 142 N.J. at 540"), "In re" / "Matter of" cases and quotations marked "(citation omitted)" are all checked; subsequent history ("certif. denied ...") is accepted only when the service confirmed it; and a reporter the check does not recognise is flagged for you.
- The delivery note's "Integrity check (report mode)" line is about the report itself: the NOT FOUND citations it lists are shown there as known-unverified, not as errors.

Check before you rely on it

- Start with the **At a glance** table. For every **issue**, open the linked opinion and read the passage; then decide whether to narrow the sentence, replace the case or drop it.
`/correct` (next chapter) does the rewriting for you.
- "NOT FOUND" for a case you know exists usually means a wrong citation (volume, page or year) — check the reporter. Claude says which one it could not find, and a leads-to line names the case the citation opens instead.
- Every "Pin cite: not verified" line: confirm the page against the reporter before you file.
- Every **Later treatment** and **Contrary authority** item: read the later court's passage (it is linked). The tag is Claude's reading of those words; whether the case is still good law for your point is your call.
- Every statute marked **NOT CHECKED**: check it yourself in the official code.

If something goes wrong

Problem	Do this
Claude says it cannot read the file	The PDF may be a scan (a picture of text). Open it in Word (File → Open — Word converts it) and save as .docx, or use the original Word file.
It stops at "Allow?" boxes over and over	Part 2, Chapter 12 B — switch approvals to Automatically approve for this chat.
It ran for a long time and stopped without a report	Type " <i>continue</i> ". If it still fails, start a new chat and run it again — a very long brief may need to be split ("verify Points I–III first").
The note says the re-lookup was done in the "same session"	Claude could not start a separate sub-agent, so it did the second lookup itself after re-reading only the list of citations. The check still ran; the certificate records how it was done.

Next: `/correct` (Chapter 17) to fix what was flagged; `/binder` (Chapter 18) once the brief is clean.

/correct — fix what /verify found

What it does: takes your brief **and** the Citation Verification Report from Chapter 16, rewrites each flagged passage so that it says only what the verified opinion supports (narrows an overextended holding, fixes an inaccurate quotation), saves the result as a **copy** — `<your brief>_corrected.docx` — in which every change is a **real Word tracked change** (the old words deleted, the new words inserted, under the author name "LVAI Pro" unless another is set), with a Word comment beside it explaining why, and then **re-verifies the corrected brief** and gives you a fresh report. A citation that could not be verified is **never silently removed**: it stays as you wrote it, with a Word comment, and is listed for you to decide. If you ask Claude to take unverifiable citations out, each one is replaced by a marker — itself a tracked insertion — that keeps the original visible:

`[FLAGGED — <case>: not verified on <service>; verify manually or remove; original: <...>]` — for example "[FLAGGED — Doe v. Roe: not verified on Midpage; verify manually or remove; original: <Doe v. Roe, 123 N.J. 456 (1990)>]".

Needs: Midpage or Descrybe (with both, cross-check mode — Chapter 13). **Files:** the brief (`.docx`) and the report's `.manifest.json` (saved next to the report by `/verify`), both in the folder. **Time:** 5–15 minutes. **You get:** `<your brief>_corrected.docx` and `Citation Verification Report - <matter> (after corrections).docx`; the summary lists any correction it had to skip (text inside a hyperlink or a footnote mark) so you can make that one by hand. Running `/correct` a second time on the same brief is safe — it does not re-apply or double up corrections.

Step by step

1

Run `/verify` first (Chapter 16). The report is now in your folder next to the brief.

2

In the **same chat**, type:

Type this (or copy and paste it):

```
/lvai-pro:correct fix the issues in the verification report and re-verify
```

In a new chat, name both files:

Type this (or copy and paste it):

```
/lvai-pro:correct brief: "Brief - MSJ.docx"; report: "Citation Verification Report - Smith v Jones.docx". Apply the corrections and re-verify.
```

3

Press **Enter**. Claude shows each proposed change (old sentence → new sentence, and why) as it goes, then saves the corrected copy and runs the new verification.

4

Open `Brief - MSJ_corrected.docx` in Word. Every change is a tracked change — the removed words struck through, the new words underlined in color — with a comment beside it saying why. If you do not see them, choose **Review** → **Display for Review** → **All Markup**; **Review** → **Show Comments** opens the comments pane.

What you get

- Your original brief is untouched. The corrected copy has the same formatting, with only the flagged passages changed — each change tracked, with a comment. Word's own tools show who made each change and when.
- A new Citation Verification Report for the corrected copy — normally all VERIFIED. If a proposition cannot be supported by any case Claude can verify, it does not invent one: the passage is narrowed or flagged for you in a comment, and the delivery note says so.
- The corrected brief is put through the integrity check in its strictest mode — one that never exempts ordinary paragraphs — so a sentence that slipped through as "not a citation" the first time is checked now. The check reads the corrected copy as if every tracked change were accepted, and, as in /verify, it requires the independent re-lookup. Every unverified citation — commented, or replaced by a `[FLAGGED – ...]` marker — is listed in the delivery note; search the document for "FLAGGED" to find the markers.

Check before you rely on it

- Read every changed sentence in context — it is now accurate, but make sure it still makes your argument. Then accept or reject each tracked change in Word (**Review** → **Accept / Reject**), as you would a colleague's edits; the comment beside each change says why.
- Before you file, make sure nothing is left over: no tracked changes still pending, and no comments (**Review** → **Delete** → **Delete All Comments in Document**).

Next: [/binder](#) (Chapter 18), then [/hyperlink](#) (Chapter 19) on the final version.

/binder — a verified Citation Binder

What it does: builds the document you hand to the judge's chambers, a senior partner or your own file: a **Citation Binder** in Word with a cover page, an explanation of how the authorities were verified, an **Index of Authorities**, and **one tab per case** containing the propositions your brief relies on, an accuracy assessment of each (does the opinion really say that?), **verified pull-quotes** word-for-word from the opinion — each with a link to the passage (on Midpage) or to the case (on Descrybe) and a pinpoint line — the case's citator treatment, where it is used in the brief, and a link to the full opinion. Statutes and rules go in an appendix, hyperlinked to their official source.

Needs: Midpage or Descrybe. If you connect both Midpage and Descrybe, every research command — /research, /deep-research, /case-summary, /verify, /correct, /binder, and /draft when it researches — checks every authority, holding, quotation and treatment on both services and tells you where they disagree. Links go to Midpage (Descrybe links only if you ask). The binder says so tab by tab ("confirmed on both services" / "confirmed on Midpage only"). **Files:** the brief (`.docx` or `.pdf`) in the folder.

Time: 10–30 minutes. **You get:** Citation Binder - <matter>.docx.

Step by step

1 Put the **final** brief in the folder (run /verify and /correct first — a binder of a brief with problems just documents the problems).

2 Cowork → folder → connectors on.

3 Type the command with the file name and the caption details you want on the cover:

Type this (or copy and paste it):

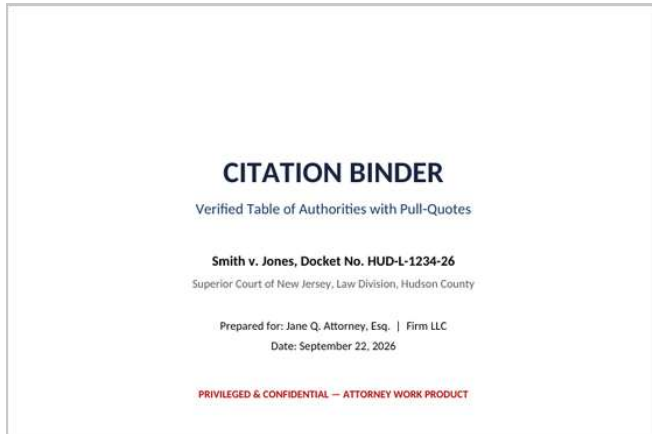
```
/lvai-pro:binder build a citation binder for "Brief -
MSJ_corrected.docx". Matter: Smith v. Jones, Docket No. HUD-L-1234-
26, Superior Court of New Jersey, Law Division, Hudson County.
Prepared for Jane Q. Attorney, Firm LLC.
```

4 Press **Enter**. Claude extracts the citations, verifies each, compares the propositions and assembles the binder. If both research services are connected, every case is checked on both and the links point to Midpage (say "*link to Descrybe*" in the request if you prefer Descrybe's pages).

5

Open the binder from the link, or from the folder.

What you get



Picture 25. Cover page: matter, court, prepared-for line, date, work-product legend.



Picture 26. Index of Authorities — one tab number per case, plus the statutes and rules appendix.

TAB 1 Brill v. Guardian Life Insurance Co. of America, 142 N.J. 520 (1995) Supreme Court of New Jersey PROPOSITION(S) RELIED UPON 1. Summary judgment is proper where the evidence, viewed most favorably to the non-moving party, would not permit a rational factfinder to find for that party. ACCURACY ASSESSMENT (1) VERIFIED — Opinion supports the proposition as stated. <i>Opinion states: whether the competent evidential materials presented, when viewed in the light most favorable to the non-moving party, are sufficient to permit a rational factfinder to resolve the alleged disputed issue in favor of the non-moving party.</i> VERIFIED PULL-QUOTE(S) <i>"...whether the competent evidential materials presented, when viewed in the light most favorable to the non-moving party, are sufficient to permit a rational factfinder to resolve the alleged disputed issue in favor of the non-moving party."</i> <i>Pinpoint not verified — confirm against the reporter</i> CITATOR / TREATMENT Midpage: no negative treatment; cited in more than 5,000 later decisions. WHERE USED Brief, Point I ¶ 2; Point II ¶ 1. Full opinion: Open on Midpage

Picture 27. A tab: the case, the proposition(s) relied upon, the accuracy assessment, the verified pull-quote, citator treatment, where it is used in the brief, and the link to the opinion.

- **Passage links.** Under each pull-quote, "[open passage on Midpage]" opens the opinion at that passage. A Descrybe link opens the case, not the passage — the binder says so: "[open case on Descrybe — Descrybe links open the case, not the passage]".
- **Pinpoints.** A pull-quote whose page could not be confirmed is marked "*Pinpoint not verified — confirm against the reporter*". Page numbers are given only where they come from the opinion itself.
- Before the binder is delivered, every case is looked up a second time by a separate sub-agent, and the integrity check confirms that every case the brief cites is in the binder.

Check before you rely on it

- Read each **Accuracy Assessment**. "VERIFIED — opinion supports the proposition as stated" is what you want; anything else names the gap between the brief and the opinion.

- Pull-quotes are exactly what the connector's opinion text says. Wherever a pull-quote is marked "Pinpoint not verified — confirm against the reporter", add the page from the reporter before the binder goes to chambers.
- Click a few of the passage links and read each passage in context.
- Print it, put the tabs in, and you have your bench binder.

If something goes wrong

Problem	Do this
A case shows "NOT FOUND" in the binder	Check the citation in the brief; fix it and run /binder again, or tell Claude the correct citation in the chat.
Some statutes are listed without links	State court rules and RPCs are listed but never linked (there is no authoritative online source). Statutes without a link could not be matched on the connector — the delivery note lists them.

Next: `/hyperlink` (Chapter 19) for the e-filed version of the brief; `/exhibit-binder` (Chapter 22) for the exhibits.

/hyperlink — make every citation clickable

What it does: finds every citation in a Word document and turns it into a clickable link: cases link to the opinion on Midpage (or on Descrybe when Midpage is not connected); statutes link to Midpage's own page for the section — or, without Midpage, to the section's page on law.onecle.com (the U.S. Code and the codes of 22 states, New Jersey and New York included — New Jersey's lettered chapters such as N.J.S.A. 40:55D-70, 46:8B-1 and 39:6A-4 too); federal rules link to Cornell's Legal Information Institute. It saves a copy named `<your document>_hyperlinked.docx`.

Needs: Midpage or Descrybe for the case links (statutes and federal rules are linked even without either). **Files:** the document as `.docx` — a PDF will not work. **Time:** 3–10 minutes.

Step by step

1 Make sure the document is a Word file (`.docx`) in your folder. If you only have a PDF: open it in Word (**File** → **Open**; Word converts it), check the text, and **File** → **Save As** → **Word Document**.

2 Cowork → folder → connectors on.

3 Type:

Type this (or copy and paste it):

```
/lvai-pro:hyperlink "Brief - MSJ_corrected.docx"
```

If both research services are connected, the links go to Midpage — you do not have to say so; a case Midpage cannot find is looked up on Descrybe and linked there, and the summary tells you which ones. Want Descrybe links throughout? Add it to the request: "... *link the cases to Descrybe*".

4 Press **Enter**. Claude lists what it found (cases, statutes, rules), resolves a link for each, and writes the copy.

5 Open `Brief - MSJ_corrected_hyperlinked.docx`. The citations are blue and underlined; hold **Ctrl** (Mac: **⌘**) and click one to test it.

POINT I — THE SUMMARY JUDGMENT STANDARD

Summary judgment must be granted when "the pleadings, depositions, answers to interrogatories and admissions on file, together with the affidavits, if any, show that there is no genuine issue as to any material fact challenged and that the moving party is entitled to a judgment or order as a matter of law." R. 4:46-2(c). The court considers whether the competent evidential materials, viewed in the light most favorable to the non-moving party, would permit a rational factfinder to resolve the disputed issue in that party's favor. [Brill v. Guardian Life Ins. Co. of Am., 142 N.J. 520, 540 \(1995\)](#). The federal standard is the same: a party who fails to make a showing sufficient to establish an essential element of its case cannot survive the motion. [Celotex Corp. v. Catrett, 477 U.S. 317, 322 \(1986\)](#). A claim for frivolous-litigation fees is governed by [N.J.S.A. 2A:15-59.1](#).

Picture 28. After /hyperlink: the case citations and the statute are links; the rule citation (R. 4:46-2(c), a state court rule) is left as plain text on purpose.

What you get

- The order of fallbacks for a case: Midpage first; then, if Descrybe is connected, Descrybe (listed as "linked on Descrybe — not in Midpage's corpus"); only then the browser fallback — with Claude in Chrome set up, the case's CourtListener page, listed as "linked via CourtListener — not verified on the research connector". A statute may come back "Onecle unreachable — verify in the browser" (try again later); that is different from "not found".
- If `eyecite` (a free citation parser) can be installed on your computer, Claude does it once and then also links short forms ("*Brundage*, 195 N.J. at 581") and unusual reporters; without it those are left as plain text.
- The delivery note tells you where the case and statute links point, how many citations of each type were found and linked, and the ones it could not find, by name.
- **Statutes get a checked page.** With Midpage, the link opens the section on Midpage. Without it, Claude looks the section up on law.onecle.com and opens the page to confirm it is the right section before linking it. Onecle carries the U.S. Code and 22 states: Alabama, Alaska, Arizona, Arkansas, California, Florida, Georgia, Hawaii, Illinois, Indiana (nine titles), Massachusetts, Michigan, Nevada, New Jersey, New York, North Carolina, Ohio, Oregon, Pennsylvania, Texas, Virginia and Washington — in the official and Bluebook forms alike (O.C.G.A. § 9-11-4, RCW 4.16.040, G.L. c. 260, § 2). A statute from any other state is listed in the delivery note without a link. (Older versions linked New Jersey statutes to a site that has since been retired; run `/hyperlink` again on any brief you still need.)
- **State court rules** (R. 4:50-1, CPLR 3211, 22 NYCRR 202.7 and the like) are detected but **not linked** — there is no authoritative online source for them. The note tells you how many were skipped so you are not surprised.

Check before you rely on it

- Click five links at random, including one statute. Then file the hyperlinked copy; keep the original.

/draft — write a brief, motion, memo or complaint

What it does: drafts a legal document **from the materials in your folder** — your research memo (Chapter 13 or 14), the opinions, the facts, the other side's papers, an earlier brief. It works in three visible steps: *Extracted Facts* (from your materials), *Extracted Law* (every rule with its citation), then the *Drafted Document*. Every statement of law carries a citation from your materials; direct quotations are used only when they match the opinion word for word; holdings are never stretched. It runs a self-check before it delivers.

Needs: nothing by default — it drafts from your uploaded materials and checks every quotation against them; say "*draft with Midpage*" (or Descrybe) to have it find and verify further authority. **Files:** the research and the facts, in the folder. **Time:** 10–30 minutes.

Document types it knows: briefs, motions, legal memoranda, oppositions, complaints, responses/replies.

Step by step

- 1 Put the materials in the folder: the research memo, the opinions you want relied on (PDFs are fine), the complaint or the motion you are answering, a statement of facts or the certification, and — if you have one — a brief of yours in the style you like.
- 2 Cowork → folder → connectors on.
- 3 Type `/lvai-pro:draft`, a space, and say **what** to draft, **for which court**, **from which files**, and anything the document must do:

Type this (or copy and paste it):

```
/lvai-pro:draft a brief in opposition to defendant's motion for
summary judgment, Superior Court of New Jersey, Law Division, Hudson
County, Smith v. Jones. Use "Research memo.docx" for the law and
"Certification of John Smith.pdf" for the facts; answer each point
in "Defendant's Brief.pdf". Point headings in the New Jersey style.
Save it as "Brief in Opposition.docx" in my folder.
```

4

Press **Enter**. If Claude needs something it cannot find (the standard of review, a date, which party you represent), it asks — answer in the chat.

5

Open the draft from the link or the folder.

What you get

- A complete, formatted document with the sections the type calls for — a memorandum has Question Presented, Brief Answer, Facts, Discussion (CREAC/IRAC) and Conclusion; a brief has Preliminary Statement, Statement of Facts, Legal Argument with point headings, Conclusion.
- Every legal proposition is cited to a source in your materials; quotations that could not be verified word-for-word are paraphrased instead, and the delivery note lists any quotation cited without a pinpoint so you can add the page.

Check before you rely on it

- Run `/verify` on the draft (Chapter 16) — always. Then `/correct`, then read the whole thing as the judge will.
- Give it your voice: *"make Point II more forceful", "shorten the preliminary statement to two paragraphs", "add a section on laches using the cases in the memo"*.

/discovery — interrogatories, document requests, admissions

What it does: three jobs. (1) **Template discovery** for common case types — divorce, custody, employment, personal injury — properly numbered interrogatories, requests for production and requests for admission with definitions and instructions. (2) **Custom discovery** drafted from the facts of your case. (3) **Responding** to discovery you received: objections with their legal basis, substantive answers where possible, and a list of what needs the client's input.

Needs: nothing extra. **Files:** the complaint or a summary of the facts (for custom); the other side's requests (to respond). **Time:** 3–10 minutes.

Step by step

1

Cowork → folder (with the complaint, or the requests you received).

2

Type `/lvai-pro:discovery` and say which of the three jobs, the case type and what you want:

Type this (or copy and paste it):

```
/lvai-pro:discovery draft a first set of interrogatories and a request for production to the defendant in a personal-injury case (slip and fall in a supermarket, Hudson County). Facts are in "Complaint.pdf". New Jersey format. Save as Word.
```

Type this (or copy and paste it):

```
/lvai-pro:discovery draft our responses and objections to "Defendant's First Set of Interrogatories.pdf". We represent the plaintiff. Flag every answer that needs the client's input.
```

3

Press **Enter**. For template discovery Claude asks the case type and which categories of questions you want (or all) — answer in the chat.

What you get

- Numbered requests in standard form (definitions, instructions, then the requests), ready to caption and serve; or the responses with objections and a "needs client" list. Ask for Word and it is saved to the folder.

Check before you rely on it

- Add the caption and the certification, check the number of interrogatories against your court's limit, and tailor the requests to what you actually need.

/exhibit-binder and /exhibits — exhibits into one PDF

What it does: takes your exhibits — PDFs, Word files, photographs — and makes **one court-ready PDF**: a **cover page** with the caption, an **Exhibit Index** (letter, description, binder pages), a **tab page** before every exhibit ("EXHIBIT A" and its description), the exhibit itself, "**Page X of Y**" at the bottom of every page, PDF **bookmarks** so the reader can jump to any exhibit, and — if you ask — **Bates numbers** (SMITH-000001 ...) on the exhibit pages. Nothing is uploaded anywhere; it all happens on your computer.

Needs: nothing extra — no research service. **Files:** the exhibits, in the folder. **Time:** 1–5 minutes. **You get:** Exhibit Binder - <case> - <what it supports>.pdf.

A. Prepare the exhibits (5 minutes, the part that matters)

1

Inside your case folder, make a sub-folder called **Exhibits** (Part 2, Chapter 10 A shows how to make a folder).

2

Copy every exhibit into it. Accepted: **PDF** (.pdf), **Word** (.docx, .doc, .rtf), **text** (.txt) and **pictures** (.jpg, .png, .tif, .gif, .bmp).

3

Anything else must become a PDF first — emails (.msg, .eml), spreadsheets (.xlsx), iPhone photos saved as .heic, web pages. Claude lists every file in the folder whatever its type and tells you which ones must be saved as PDF before they can go in:

- **Mac:** open the item → **File** → **Print** → click the **PDF** button at the bottom-left of the print window → **Save as PDF** → save it into the Exhibits folder.
- **Windows:** open the item → **File** → **Print** → choose the printer **Microsoft Print to PDF** → **Print** → save it into the Exhibits folder.
- **Outlook email:** open the email → File → Print → PDF as above (attachments are separate exhibits — save each one).
- **iPhone photo (.heic):** open it in Preview (Mac) or Photos (Windows) → File → Export / Save as → JPEG, into the Exhibits folder.

4

Name the files in the order you want them, with a number first and a description after it, for example:

01 Contract of Sale dated March 2 2026.pdf

02 Emails between counsel March 3-9 2026.docx

03 Photograph of the premises March 10 2026.jpg

The number fixes the order; the words become the description on the tab page and in the index. (You can also dictate order and descriptions in the chat instead — see step B3.)

5

Open each PDF once and page through it: is it complete, right side up, readable, not password-protected? A locked PDF stops the build — save an unlocked copy.

B. Build the binder

1

Cowork → choose the case folder (the one that contains **Exhibits**) → Legal Velocity connector on.

2

Type `/lvai-pro:exhibit-binder`, a space, and tell it five things: **where the files are, the order, letters or numbers, the caption, and Bates numbers or not**:

Type this (or copy and paste it):

```
/lvai-pro:exhibit-binder merge the files in the Exhibits folder, in
the order of their numbers, labelled A, B, C. Caption: Superior
Court of New Jersey, Law Division, Hudson County; John Smith,
Plaintiff, v. Jane Jones, Defendant; Docket No. HUD-L-1234-26; Civil
Action; title "EXHIBITS TO PLAINTIFF'S MOTION FOR SUMMARY JUDGMENT";
submitted by Jane Q. Attorney, Esq., Firm LLC, 100 Main Street,
Newark, NJ 07102, Attorney for Plaintiff; dated today. No Bates
numbers. Save it as "Exhibit Binder - Smith v Jones - MSJ.pdf".
```

Shorter is fine too — Claude asks for whatever is missing, once:

Type this (or copy and paste it):

```
/lvai-pro:exhibit-binder the files in Exhibits, in order, for the
summary-judgment motion in Smith v. Jones. Take the caption from
"Brief - MSJ.docx".
```

3

If you did not number the files, dictate the order and descriptions in the chat when Claude asks — or right away:

Type this (or copy and paste it):

Order and descriptions: A = contract.pdf "Contract of Sale dated March 2, 2026"; B = emails.docx "Emails between counsel, March 3-9, 2026"; C = photo.jpg "Photograph of the premises taken March 10, 2026"; D = pages 3 only of contract.pdf "Contract of Sale – signature page only".

4

Press **Enter**. Claude lists the files it found with their page counts and shows the plan as a table — *Exhibit · Description · File · Pages*. **Read it.** If anything is wrong (order, a missing file, a description), say so; when it is right, say "*build it*".

5

Claude builds the PDF (a few seconds to a couple of minutes for scanned exhibits) and reports: number of exhibits, total pages, the binder pages of each exhibit, the Bates range if used, and the file's link.

6

Open the PDF and page through it once — cover, index, each tab, each exhibit, page numbers at the bottom. Then file it, serve it or print it.

What you get

SUPERIOR COURT OF NEW JERSEY LAW DIVISION: HUDSON COUNTY	
JOHN SMITH, Plaintiff, v. JANE JONES, Defendant.	Docket No. HUD-L-1234-26 CIVIL ACTION

EXHIBITS TO PLAINTIFF'S MOTION FOR SUMMARY JUDGMENT

4 exhibits: A – D

Jane Q. Attorney, Esq.
Firm LLC
100 Main Street, Newark, NJ 07102
Attorney for Plaintiff

Dated: September 22, 2026

Page 1 of 12

Picture 29. The cover page with the caption, the title, "4 exhibits: A – D" and the attorney block.

EXHIBIT INDEX		
Exhibit	Description	Pages / Bates
A	Contract of Sale dated March 2, 2026	3–5 SMITH-000001 – SMITH-000003
B	Emails between counsel, March 3–9, 2026	7 SMITH-000004 – SMITH-000004
C	Photograph of the premises taken March 10, 2026	9 SMITH-000005 – SMITH-000005
D	Contract of Sale — signature page only	11 SMITH-000006 – SMITH-000006

Page 2 of 12

Picture 30. The Exhibit Index: letter, description, binder pages — and the Bates range when Bates numbers are on.



Picture 31. A tab page before each exhibit.



Picture 32. An exhibit page: "Page 4 of 12" at the bottom and, here, the Bates number SMITH-000001 at the right.

Options you can ask for

Say...	...and you get
"numbers instead of letters" / "P-1, P-2" / "D-1, D-2"	Exhibit 1, 2, 3 — or the New Jersey trial style P-1 ... (plaintiff) or D-1 ... (defendant).
"Bates numbers, prefix SMITH, starting at 1"	SMITH-000001, SMITH-000002 ... on every exhibit page (not on the cover, index or tabs). Use this for discovery productions.
"pages 3–5 of contract.pdf only"	Only those pages of that file become the exhibit.
"no index" / "no tab pages" / "no page numbers"	Those parts left out.
"also give me one PDF per exhibit"	Separate files (Exhibit A.pdf, Exhibit B.pdf ...) in addition to the combined binder — some e-filing systems require it.
"take the caption from the brief"	Claude reads the first page of the brief in the folder and uses its caption instead of asking you to type it.

Say...	...and you get
"put the page stamp higher" / "stamp at the top" / "move the stamp half an inch up"	The "Page X of Y" stamp normally sits low on the page, on a small white box, so it does not collide with an exhibit's own footer or page number. Its position and offset can be changed if an exhibit needs it.

Check before you rely on it

- Cover: court, parties, docket number, title, attorney block — nothing is invented; if you did not give a docket number, there is none on the cover. Add it and rebuild if needed.
- Index page numbers match the tabs (they are computed, but look once).
- Scanned exhibits look exactly as they were — the binder wraps your files, it does not clean them up.

If something goes wrong

Claude says...	Do this
"X.xlsx / X.msg / X.heic must be saved as PDF first"	Step A3 — print it to PDF (or export the photo as JPEG), put that file in Exhibits, run again. Claude lists such files rather than silently skipping them.
"password-protected"	Open that PDF, enter the password, File → Save As a new copy without a password (Acrobat: File → Properties → Security → No Security). Run again.
"LibreOffice is missing" for a Word file	Open the Word file in Word → File → Save As → PDF, into Exhibits. Run again.
"LibreOffice produced no PDF (a LibreOffice window may be open)"	Close LibreOffice (all its windows) and run again — or save the Word file as PDF yourself.
Files from an earlier run are in the folder	Nothing to do: the combined PDF and the "Exhibits to ..." folder from a previous run are recognised and ignored, not treated as exhibits.
Index page numbers	The exhibit list gives each exhibit's own pages; its tab page is the page before.
The page count is not what you expected	Claude says so itself and does not deliver quietly. Usually a two-sided scan or a blank page; open the exhibit file and check.

C. /exhibits — when the exhibits belong to a certification or affirmation

What it does: a certification (New Jersey), affirmation (New York), affidavit or declaration says things like *"Attached hereto as Exhibit A is a true and accurate copy of the lease dated September 8, 2025."* `/exhibits` reads the certification, finds **every exhibit it refers to**, matches each one to the right file in your folder, **checks that the file is what the certification says it is** (a lease, dated September 8, 2025 — not the 2023 lease), and produces the **certification followed by tab pages and exhibits in one PDF**, an exhibit list, PDF bookmarks, and **one PDF per exhibit** for e-filing systems (NYSCEF) that take exhibits separately. The labels and order are the certification's — it never reletters.

Needs: nothing extra. **Files:** the certification (`.docx` or `.pdf`) and the exhibit files, in the folder. **Time:** 1–5 minutes. **You get:** `<Certification> - with Exhibits.pdf` and a folder `Exhibits to <Certification>`.

1

Put the finished certification and the exhibit files in the case folder (exhibits can sit in an `Exhibits` sub-folder). File names that start with the letter help — `Exhibit A - Lease.pdf` — but are not required: Claude reads the files.

2

Cowork → choose the case folder → Legal Velocity connector on. Type:

Type this (or copy and paste it):

```
/lvai-pro:exhibits attach the exhibits to "Certification of John Smith.docx"; the files are in the Exhibits folder
```

3

Press **Enter**. Claude shows a table — *Exhibit · what the certification says · file · pages · match*. Every row says **matches, check** (the file is the right kind of document but a detail differs: "the certification says September 8, 2025; the lease in the file is dated September 18, 2025") or **missing** (no file fits). It also lists files in the folder that the certification does not mention (files of any type — with a note for the ones that must be saved as PDF first: `.heic` photos, `.msg` / `.eml` emails, `.xlsx` spreadsheets), and warns about gaps in the lettering (A, B, D) or an exhibit mentioned out of order. A reference to an exhibit of *another* document — "the lease attached as Exhibit B to the Complaint" — is listed separately as **mentioned, not attached** and is never matched to a file.

4

Answer only what is flagged: fix the date in the certification, supply the missing file, or say which file is Exhibit B. When every row matches, Claude builds without asking.

5

Open the combined PDF once: certification first (its own page numbers untouched), then the exhibit list, then EXHIBIT A, B, C ... each behind a tab page. File that, or upload the individual exhibit PDFs one by one where the court's system wants them separately.



The certification governs. If the certification itself is wrong — a missing letter, the same exhibit described two ways, a date that does not match the document — `/exhibits` tells you and stops. Fix the certification and run it again; it will not quietly relabel the exhibits to fit.



Tracked changes. If the certification still contains unaccepted tracked changes, it is printed **with the changes accepted** and Claude warns you. Accept or reject the changes in Word first (Review → Accept All) if that is not what you want filed.

Say...	...and you get
"only the combined PDF" / "only the separate exhibits"	Just that output.
"add a cover page"	A caption cover page in front (the caption is taken from the certification's first page).
"no exhibit list"	Certification, then straight to the tabs.
"file it without Exhibit C"	A one-page placeholder tab ("Exhibit C — to be supplied") so the lettering stays intact; the report says so.
"Bates numbers, prefix SMITH"	Bates numbers on the exhibit pages, as in section B.
"put the page stamp higher"	Moves the "Page X of Y" stamp (it sits low, on a white box, so it stays clear of an exhibit's own footer), as in section B.

/intake — start a real-estate transaction

What it does: reads the contract (and the rider, if any) for a New Jersey or New York residential, condo or co-op deal, pulls out the parties, the property, the price and deposits, every **critical date** (attorney review, inspections, mortgage commitment, title, closing), works out which side you represent, shows you a **transaction summary**, puts the dates on your calendar if a calendar is connected, and lists the next steps for your side (rider, title order, payoffs, deed...).

Needs: nothing extra (Google Calendar or Outlook connected for the calendar part — Part 1, Chapter 5, note; without a calendar you get the dates as a table and a note to connect one). **Files:** the contract, and the rider if there is one, as PDF or Word. **Time:** 2–5 minutes.

Step by step

1

Make a folder for the deal — name it for the property, e.g.

100 Main Street Hoboken — and put the contract (and rider) in it.

2

Cowork → that folder → Legal Velocity on (and your calendar, if connected).

3

Type:

Type this (or copy and paste it):

```
/lvai-pro:intake new transaction. Contract and rider are in the
folder. We represent the buyer.
```

4

Press **Enter**. Claude shows the transaction summary. Check every date and figure against the contract; tell it anything it got wrong (*"the closing date is on or about October 15, not October 5"*).

5

It then offers the next steps — say yes to the ones you want (*"yes, prepare the buyer's rider and calendar the dates"*).

What you get

- The summary in the chat (property, state, parties, price, deposits, dates, representation), the dates on your calendar (Chapter 25), and a to-do list for your side. Ask "*save the summary as Word*" for a file.

Check before you rely on it

- Dates. Every one, against the contract, especially anything "days after" attorney review — the calculation depends on when review ended.

Next: `/prepare-rider` (Chapter 24), `/calendar-dates` (Chapter 25).

/prepare-rider — a buyer's or seller's rider

What it does: writes a contract rider as a Word document for the side you represent — **buyer or seller, residential, condo or co-op, New Jersey or New York** — with the standard provisions and those for your side and the property type (condo/co-op documents, board approval, assessments), filled in from the deal's details.

State-specific provisions: both New Jersey riders have a rewritten attorney-review clause and a **Bulk Sale Act** clause (where the Act applies, Form C-9600 at least 10 business days before closing); the New Jersey seller's rider adds the **flood-risk disclosure** (N.J.S.A. 56:8-19.2) and, for a house built before 1978, the **lead-based paint disclosure**. New York condo and co-op riders leave out the Property Condition Disclosure paragraph (RPL § 461(5)(b)).

Needs: nothing extra. **Files:** the contract, or give the details in the chat. **Time:** 2–5 minutes. **You get:** `<Property Address> - Buyer Rider.docx` (or Seller Rider).

Step by step

1

Cowork → the deal's folder (with the contract, or after /intake).

2

Type the command with the three choices — side, property type, state:

Type this (or copy and paste it):

```
/lvai-pro:prepare-rider buyer, condo, NJ. Use the contract in the
folder for the details. Add: closing contingent on the buyer's
mortgage commitment within 30 days; seller to deliver the condo
documents within 5 days.
```

3

Press **Enter**. Claude asks for anything it cannot find in the contract (deposit amounts, dates, special terms). Answer in the chat.

4

Open the rider from the link. Edit it in Word like any draft.

Check before you rely on it

- Read every provision. The rider is a professional starting draft in your firm's format — the negotiation is yours. Delete what does not fit the deal.

/calendar-dates — every deadline on your calendar

What it does: collects every critical date of the transaction (from /intake, from the contract, or from what you type), creates an event for each on **Google Calendar or Outlook** — consistently named ("100 Main St — Mortgage Commitment Deadline"), with the details and reminders set — and shows you the list. It can change or move them afterwards.

Needs: the **Google Calendar** or **Outlook** connector, connected and switched on (Part 1, Chapter 5 note; Part 2, Chapter 11). Without a calendar it gives you the dates as a document instead. **Time:** 1–3 minutes.

Step by step

1

Connect your calendar once: Settings → Connectors → Discover → search `Google Calendar` (or `Outlook`) → Connect → sign in to Google/Microsoft → Allow.

2

Cowork → the deal's folder → connectors on (Legal Velocity and the calendar).

3

Type:

Type this (or copy and paste it):

`/lvai-pro:calendar-dates calendar all the dates in the contract in the folder. Closing is on or about October 15, 2026. Put a reminder two days before each date.`

4

Press **Enter**. Claude lists the dates it will create; confirm, and it creates them. Open your calendar to see them.

Check before you rely on it

- Compare the list with the contract once. To change one later: *"move the inspection deadline to October 3"*.

/title-review — review a title binder (and, for a seller, the closing documents)

What it does: reads the title binder or commitment (Schedule A, Schedule B-I requirements, Schedule B-II exceptions, chain of title), grades every issue **RED** (must be resolved before closing — open mortgages, judgments, liens, breaks in the chain), **YELLOW** (needs attention — easements, restrictions, survey matters) or **GREEN** (standard), writes a **Title Review Report** in Word, and — when you represent the seller — **offers to prepare the closing documents** (Chapter 27) once you have supplied the details the binder does not contain.

Needs: nothing extra. **Files:** the title binder/commitment PDF; the contract (or an /intake done earlier) in the same folder. **Time:** 3–10 minutes. **You get:** the report in the deal's folder and, if you say yes to the closing documents, a sub-folder

<Property Address> - Closing Documents .

Step by step

1 Put the title binder PDF in the deal's folder next to the contract.

2 Cowork → folder → Legal Velocity on.

3 Type:

Type this (or copy and paste it):

/lvai-pro:title-review review "Title Commitment.pdf" for the sale of 100 Main Street, Hoboken. We represent the seller. Then prepare the closing documents.

4 Press **Enter**. Claude reports the issues (RED first), the action items before closing, and any missing information, with links to the report and the documents.

Check before you rely on it

- Every RED item, against the binder itself. Then the closing documents as in Chapter 27.

/closing-docs — the closing documents, filled in

What it does: prepares the seller-side closing package from the deal's details (the contract, /intake, the title binder or what you type).

New Jersey: one Word document with the **Deed**, **Affidavit of Title**, **1099-S** and **FIRPTA** certification (`1 - Deed-AOT-1099-FIRPTA.docx`), a **Seller Closing Statement** if asked, and the state forms **filled in:** **GIT/REP-3** (or GIT/REP-1 for a non-resident), **RTF-1** Affidavit of Consideration — with the realty transfer fee calculated — and **RTF-1EE** where it applies.

New York: Bargain and Sale Deed, a New York **Affidavit of Title** from its own template (not the New Jersey form), FIRPTA affidavit, Seller Closing Statement, the **TP-584** (or TP-584-NYC) and **TP-584-1** filled once the blank forms are downloaded from tax.ny.gov or placed in the folder (the New York forms are not bundled — Claude gives you the link), a worksheet with every value for the State's barcoded **RP-5217-PDF** (which must be completed in Adobe Acrobat; Staten Island uses RP-5217-NYC, the other boroughs file through ACRIS), and the transfer taxes calculated.

FIRPTA: the affidavit comes in two versions — for an **individual** seller (a natural person) and for an **entity** seller (a corporation, partnership, trust or estate). Claude picks the one that fits the seller and asks if it cannot tell; check the choice against the deed and the title binder.

Needs: nothing extra. **Files:** the contract; the prior deed if you have it (for the "being the same premises" recital); the title binder. **Time:** 3–8 minutes. **You get:** a sub-folder

`<Property Address> - Closing Documents`, files numbered in signing order.

Step by step

1

Cowork → the deal's folder → Legal Velocity on.

2

Type the command and give what is not in the contract — the sellers' new address, marital status, the prior deed reference, the block and lot, the settlement date:

Type this (or copy and paste it):

```
/lvai-pro:closing-docs NJ, 100 Main Street, Hoboken (Hudson
County), Block 123 Lot 45. Sellers John A. Smith and Mary B. Smith,
husband and wife, moving to 45 Oak Lane, Montclair, NJ 07042. Buyers
Robert C. Jones and Linda D. Jones. Price $650,000. Prior deed from
William E. Brown dated June 3, 2015, recorded June 12, 2015, Deed
Book 9876 page 321. Closing October 2026. Sellers are NJ residents.
Include a seller closing statement.
```

3

Press **Enter**. Claude asks for anything still missing, fills the templates and the forms, and lists every document with a link and a status.

4

Open each file. The Word document is ready to edit; the PDFs open in Preview or Acrobat.

What you get

DEED

Prepared by:

Jane Q. Attorney, Esq.

THIS DEED is made on October , 2026, between **JOHN A. SMITH and MARY B. SMITH, husband and wife** whose address is 45 Oak Lane, Montclair, New Jersey 07042 referred to as the Grantor(s), and **ROBERT C. JONES and LINDA D. JONES, husband and wife**, whose address is about to be 100 Main Street, Hoboken New Jersey 07030, referred to as the Grantee. The words "Grantor" and "Grantee" shall mean all Grantors and all Grantees listed above.

Transfer of Ownership. The Grantor grants and conveys (transfers ownership of) the properties described below to the Grantee. This transfer is made for the sum of **SIX HUNDRED FIFTY THOUSAND (\$650,000.00) DOLLARS and Zero Cents**. The Grantor acknowledges receipt of this money.

Tax Map Reference. (N.J.S.A. 46:15-2.1) City of Hoboken, County of Hudson, and State of New Jersey, Block No. 123, Lot No. 45.

[] No property tax identification number if available on the date of this deed (Check box if applicable.)

Property. The property consists of the land and all the buildings and structures on the land in the City of Hoboken, County of Hudson, and State of New Jersey. The legal description is:

See the attached legal description attached herein as Schedule A.

Being the same premises conveyed to JOHN A. SMITH and MARY B. SMITH, husband and wife, by Deed from William E. Brown, a single man, dated June 3, 2015, recorded June 12, 2015 in the Hudson County Register's Office in Deed Book 9876, Page 321.

This conveyance is subject to easements and restrictions of record, if any, such state of facts as a current survey may disclose and Zoning Ordinances of the City of Hoboken.

Picture 33. The first page of the combined NJ document — the Deed, filled in from the deal's details (sample data).

/analyze-form — see every field of a PDF form

What it does: opens a PDF form and lists **every fillable field** — its name, type (text, checkbox, date, signature) and where it is on the page — without filling anything. Use it to see what a form asks for before you gather documents, or when /fill-form left something blank and you want to know why.

Needs: nothing extra. **Files:** the form (`.pdf`). **Time:** under a minute.

1 Put the form in the folder → Cowork → folder → Legal Velocity on.

2 Type:

Type this (or copy and paste it):

```
/lvai-pro:analyze-form "Family Part Case Information Statement.pdf"
```

3 Press **Enter**. Claude shows the field map in a table. "This PDF has no fillable fields" means it is a flat form — /fill-form can still fill it by placing text on the page.

/fill-form — fill a PDF form from your documents

What it does: fills a PDF form — a Case Information Statement, a financial affidavit, a court form — from the documents in your folder: tax returns, W-2s, 1099s, paystubs, bank and brokerage statements, the pleadings. It inventories the documents, maps the form's fields, extracts every data point, fills the form (fillable or flat), **checks its own work**, and delivers the filled PDF with a note saying where each figure came from and which fields it could not fill.

Needs: nothing extra. **Files:** the blank form and the source documents. **Time:** 3–10 minutes. **You get:** a new, filled copy of the form (the blank original is never changed) in the folder.

Step by step

1

Put the **blank form** and **every source document** in the folder. Name them for what they are (`2025 Form 1040.pdf`, `Paystub Aug 2026.pdf`, `Chase statement Jul 2026.pdf`).

2

Cowork → folder → Legal Velocity on.

3

Type:

Type this (or copy and paste it):

```
/lvai-pro:fill-form fill "Family Part Case Information Statement.pdf" for our client Mary Smith, the plaintiff, from the tax returns, paystubs and bank statements in the folder. Leave anything you cannot source blank and list it.
```

4

Press **Enter**. Claude may ask which party the form is for or how to treat a figure it finds twice — answer in the chat. **Before it fills anything it shows you the data mapping** — which figure goes in which field and where it came from. Read it and correct anything wrong (*"line 12 should use the 2025 return, not 2024"*), then tell it to go ahead.

5

Claude fills the form, checks its own work page by page, and reports: fields filled (X of Y), fields left blank for lack of data, any calculated fields with the formula used. Open the filled PDF and the note side by side.

Check before you rely on it

- Every figure against its source page — the note tells you which document and page each came from. Fields it could not fill are listed; fill them by hand.
- The form's layout is untouched; only the fields are filled. Sign and date by hand.
- New Jersey Family Part CIS: the "Date of Divorce" field is filled only when the judgment of divorce has been entered (post-judgment matters); in a pending divorce it is left blank on purpose.

If something goes wrong

Problem	Do this
Figures missing that are in a scanned statement	Scans of poor quality cannot always be read. Download the statement from the bank's website as a PDF instead of scanning paper.
Wrong party's income used	Say whose form it is: <i>"the CIS is for the plaintiff, Mary Smith; John Smith's figures go in the 'other party' columns"</i> .

/extract-data — pull the numbers out of documents

What it does: reads tax returns, W-2s, 1099s, paystubs, bank/brokerage/retirement statements, mortgage statements and pleadings, and gives you **every data point in a structured table** — income by source, assets and balances by account, liabilities, dates, identifiers — with the document and page each came from. Nothing is filled in; this is the "show me what you found" step, useful before /fill-form, for a settlement worksheet or for discovery responses.

Needs: nothing extra. **Files:** the documents. **Time:** 2–5 minutes.

1

Documents in the folder → Cowork → folder → Legal Velocity on.

2

Type:

Type this (or copy and paste it):

```
/lvai-pro:extract-data extract all income, assets and liabilities  
from the documents in the folder into a table, with the source of  
each figure. Save it as Excel.
```

3

Press **Enter**, then open the table from the link.

Check before you rely on it

- Spot-check the largest figures against the source pages. Ask for a different layout if you need one (*"one row per account, columns for each month"*).

/license — your license, billing and renewal

What it does: shows who the license is issued to, the License ID, the seat, the plan, the date it is valid through, its status — and, under "Billing", the one line that applies to your kind of license (the table below). There is no all-purpose "renew" link: a subscription renews itself, a complimentary license is kept by upgrading, and a hand-issued license is renewed by email.

Needs: only the Legal Velocity connector. Works in Chat or Cowork. **Time:** seconds.

- 1 New chat (Chat or Cowork, either is fine).
- 2 Type `/lvai-pro:license` and press **Enter** — or simply:

Type this (or copy and paste it):
Check my LVAI Pro license status
- 3 Claude shows the details and the billing line for your license. Click a link in it to open it in your browser.

Your license	What the reply shows, and what to do
Subscription (bought on the website, monthly or annual)	"Billing: subscription active — renews automatically on <date>" and, on the primary seat (the first seat issued for the license), a Manage billing link to the billing portal: update the card, add or remove seats, switch between monthly and annual, or cancel. Other seats see "Billing changes are made from the primary seat's Claude account, or via admin@legalvelocity.ai." The license extends itself with every payment — nothing to reinstall. If a payment fails, the reply says so: update the card through the same link; the license keeps working for up to 7 days while the payment is retried.

Your license	What the reply shows, and what to do
Free trial (started on the website)	"Billing: free trial through <date> — the card on file is then charged for the monthly plan automatically; cancel before that day to avoid the charge". Nothing to do to continue: the trial converts by itself on its last day and the license simply carries on — same connector, same plugin. If you do not want it, cancel before that day in the billing portal (the Manage billing link in this reply, on the primary seat) and you pay nothing; the license then ends with the trial. A trial has no upgrade link and no end-of-trial reminder emails (those are for complimentary licenses) — the date in your setup email and in this reply is the one to watch.
Complimentary license (given to you free through a date)	"Billing: complimentary — nothing to pay and no card on file; the connector stops on <date> unless the license is upgraded", followed by an upgrade link to the monthly or annual plan. Upgrading before the free period ends keeps everything as it is, and billing starts only when the free period is over. Legal Velocity emails you a reminder a week before it ends, the day before, and the day after, each with the same upgrade buttons. There is no grace period: it stops on its last free day unless upgraded.
Hand-issued license (arranged by email, paid outside the website)	"Renewals and support: admin@legalvelocity.ai". Email us before the expiry date to renew; the license keeps working for a 7-day grace period after that date while the renewal is arranged.

i **Cancelling and adding seats.** Cancelling in the billing portal stops all future charges; the license keeps working until the date you have already paid through, then stops. Adding a seat in the billing portal (change the quantity) issues the new seat automatically and emails its setup guide to your address — forward it to the new person. Anything the portal cannot do: admin@legalvelocity.ai.

PART 4

When something goes wrong

Find your symptom in the left column. Nine times out of ten the fix is one of the first three rows.

Problems and fixes

Installing and connecting

What you see	What it means and what to do
Claude says "LVAI Pro needs the Legal Velocity connector", or "I don't have a <code>get_skill / license_status</code> tool"	The connector is not switched on for this chat, or was never added. Part 2, Chapter 11 : click + → Connectors and switch Legal Velocity on. Not in that list? Part 1, Chapter 6 .
"No legal-research connector" / "Midpage (or Descrybe) is not available"	Same fix for the research connector: switch it on (Part 2, Chapter 11) or connect it (Part 1, Chapter 5).
Typing  shows no LVAI Pro commands	The plugin is not installed, or you are on the free plan. Part 1, Chapter 7 (plugin) and Chapter 2 (plan). Also: quit Claude Desktop completely and open it again — new plugins sometimes appear only after a restart.
In Settings → Connectors, a connector shows Reconnect or a warning triangle	Its sign-in expired. Click Reconnect , sign in to Midpage/Dscribve (or Google) again, click Allow.
Connecting Legal Velocity fails, or no sign-in code arrives	The address you typed must be the one on your license — the mailbox your setup email came to. Check the spam folder, click Send a new code once (codes last ten minutes), and if nothing comes, email admin@legalvelocity.ai from the license address. If you added the connector by address, it must be exactly <code>https://mcp.legalvelocity.ai/mcp</code> (Part 1, Chapter 6).
Claude says the connection "was replaced by a newer sign-in", or Legal Velocity suddenly shows Reconnect	Someone signed in to your seat from another Claude account (you were emailed about it). Each seat works on one Claude account at a time: click Reconnect and sign in again — that signs the other account out. If it was not you or a colleague using your seat, email admin@legalvelocity.ai ; if your firm needs a second person, add a seat (below).

What you see	What it means and what to do
Claude says <i>"license expired / unpaid / deactivated"</i>	Run <code>/license</code> (Chapter 31): the reply says what happened and shows the billing line for your kind of license — a subscription whose payment failed gets the Manage billing link (on the primary seat) to fix the card; a complimentary license that has ended gets the upgrade link; a free trial that ended without converting (the card was declined or the trial was cancelled) comes back when you update the card in the billing portal or subscribe again on the website; a hand-issued license shows "Renewals and support: admin@legalvelocity.ai". Questions: admin@legalvelocity.ai.
<i>"daily limit reached"</i>	The fair-use limit in the Terms — 400 connector requests per seat per day — is used up (very large binders can do it). It resets at midnight UTC (8 p.m. in New York in summer, 7 p.m. in winter); if it happens often, email us.
<i>"Uninstall the earlier LVAI Pro plugin first"</i>	Customize → Plugins → open the plugin → ⋮ → Remove, then install the new file (Part 1, Chapter 7).
The plugin file downloaded with a different name, or the browser blocked it	Click Keep if the browser asks. The file must be named <code>lvai-pro.plugin</code> ; if it was renamed (e.g. <code>lvai-pro.plugin.zip</code>), rename it back, or use the download button in your email again.

Cowork and folders

What you see	What it means and what to do
Claude says it cannot find the file	The file is not in the folder you chose, or it is spelled differently. Check the folder in Finder / File Explorer; say the exact name in quotes (<i>"the file is 'Brief - MSJ.docx'"</i>). If you added the file after starting the chat, tell Claude: <i>"I just added it — look again"</i> .
No Cowork button under the message box	You are on the website or the phone app, or an old version of Claude Desktop. Use Claude Desktop (Part 1, Chapter 3) and let it update (Claude menu → Check for updates).

What you see	What it means and what to do
Add folder does nothing, or the folder is greyed out	Your computer has not given Claude permission to read that location. Mac: System Settings → Privacy & Security → Files and Folders → Claude → allow Documents/Desktop (or wherever the folder is). Windows: choose a folder inside Documents.
Files in the folder are "cloud only" (a cloud icon next to them)	Right-click the file → Download now (iCloud: "Download Now"; OneDrive: "Always keep on this device"). Claude can only read files that are actually on the computer.
"Allow?" boxes keep interrupting	Part 2, Chapter 12 B: set the approvals button to Automatically approve .
The result went into the wrong folder	Claude saves into the folder chosen for the session. Say where: <i>"save it in the Exhibits sub-folder"</i> . Move the file by hand if needed.

Results

What you see	What it means and what to do
A case shows NOT FOUND but you know it exists	Usually a wrong citation (volume, page, reporter or year). Check the reporter and tell Claude the correct cite. Very new opinions may not be on the service yet — the report says which service it searched.
The report says OVEREXTENDED and you disagree	Open the linked opinion and read the passage Claude quoted. Then decide; you can tell Claude <i>"I read it — keep the sentence as it is"</i> . It never changes your original file.
Claude says you have reached your usage limit	That is Claude's own plan limit (not LVAI Pro's "daily limit"). Max effort uses 5.5× or more of it, so long jobs reach it sooner. Wait for the reset time Claude shows, or switch Effort to High or Extra (Chapter 9) and type <i>"continue"</i> . If it happens often, consider Claude's Max plan (Chapter 2).
Claude stopped in the middle of a long job	Type <i>"continue"</i> . If it stops again, start a new chat and run the command on a smaller piece (<i>"verify Points I and II only"</i>).
Claude wrote the document in the chat but no file appeared	Ask: <i>"save that as a Word document named X in my folder"</i> .

What you see	What it means and what to do
A Word file will not open / looks wrong	Open it with Microsoft Word (not Pages or Google Docs). Word comments and hyperlinks need Word.
The exhibit binder refuses a file	Chapter 22: print it to PDF, unlock it, or save the Word file as PDF; run again.
Claude gives a general answer without using LVAI Pro	Use the slash command explicitly (<code>/lvai-pro:verify</code> ...). If the commands are missing from the list, see "Installing" above.
Something else	Email admin@legalvelocity.ai : chapter and step, what the screen shows (a screenshot), Mac or Windows. Never include sign-in codes or client documents.

Questions people ask

Is my client's data safe?

Legal Velocity's server receives only the names of the skills, scripts and templates the plugin asks for, and counts them. Your documents stay in your Claude workspace. Case-law lookups go to Midpage or Descrybe under your own account — the citations and the sentences that cite them, never the whole document unless you ask. Claude itself reads your files on Anthropic's servers, under your Claude plan's terms. On Pro or Max, switch off model improvement in Claude's own settings (your initials → Settings → **Privacy** → "Help improve our AI models") so that your conversations are not used to train Anthropic's models; firms on Team or Enterprise plans are covered by Anthropic's commercial terms, which say Anthropic may not train models on customer content. Everything LVAI Pro makes — reports, binders, filled forms, closing documents — is saved in your case folder. The page legalvelocity.ai/security.html follows your data hop by hop: what each service receives, what it keeps, and what its own terms say. Our privacy policy is at legalvelocity.ai/privacy.html.

Do I need both Midpage and Descrybe?

No — one is enough. If you connect both Midpage and Descrybe, every research command — `/research`, `/deep-research`, `/case-summary`, `/verify`, `/correct`, `/binder`, and `/draft` when it researches — checks every authority, holding, quotation and treatment on both services and tells you where they disagree. Links go to Midpage (Descrybe links only if you ask). It is the strongest possible check for a filing that matters; Midpage is the more accurate of the two and has the statutes built in.

Can two people in my firm use one license?

Each seat is one person and works on one Claude account at a time: when a second person signs in to the same seat, the first is signed out and the licensee is emailed — so sharing a seat means signing each other out all day, besides being a breach of the license terms. Extra seats can be added any time: on a subscription, change the quantity in the billing portal (the Manage billing link in `/license`, on the primary seat) — the new seat is issued automatically and its setup guide is emailed; otherwise email admin@legalvelocity.ai.

How do I know which version I have, and how do I update?

The skills themselves are delivered live through the connector, so they are always current. The plugin (the command list) changes when a command is added; you get an email with the subject "LVAI Pro update: <title>" — with a download button when the file changed. The update email always says the version; if in doubt, install the file — installing the same version again is

harmless. Chapter 34 walks through it; the current file is always at

<https://lvai-license-server.legalvelocity.workers.dev/public/lvai-pro.plugin>.

Type `/lvai-pro:license` to see your license details at any time.

Does it work on the Claude website (claude.ai) or on my phone?

LVAI Pro runs in Claude Desktop with Cowork on a paid Claude plan (Pro or Max; Team and Enterprise through your organization owner). The phone app and the web app cannot run the file-based commands. Since the connectors and the plugin live in your account, a chat-only command such as `/license` answers on the website too — but everything that reads or writes files in a folder (research memos, verification, binders, hyperlinking, forms, exhibits, closing documents) needs **Claude Desktop** in Cowork.

Which Claude model should I use?

For complex legal work (research, verification, citation binders, corrections, drafting), Legal Velocity AI recommends **Opus 5.5** with the effort set to **Max**: model button at the right of the message box → **Opus 5.5** → **Effort** → **Max** (Part 2, Chapter 9). Max is the most thorough setting and the slowest, and it uses your Claude plan's allowance faster ("5.5× or more usage"), so heavy daily users are best served by Claude's Max plan. Every command is verified the same way whichever model you use; the recommendation is about how thoroughly Claude works through a long job.

What does it cost, all in?

Three subscriptions, to three companies: Claude Pro (about \$20/month, Anthropic), Midpage (\$100/month after the trial) or Descrybe (\$25/month), and LVAI Pro (Legal Velocity — monthly or annual; your setup email or `/license` shows your plan). Prices are the providers' published prices in September 2026.

How do I cancel or change my LVAI Pro plan?

On a subscription or a free trial, run `/license` on the primary seat and use the Manage billing link: update the card, change seats, switch between monthly and annual, or cancel. Cancelling stops all future charges and the license runs to the date you have paid through (a cancelled trial simply ends on its last day, unbilled). A complimentary license is kept by using the upgrade link in the `/license` reply or in the reminder emails. A hand-issued license: email admin@legalvelocity.ai.

Can Claude file the document for me, or send it to the client?

No. LVAI Pro produces the documents; filing and sending are yours — as is reading them first.

What if I just describe what I want instead of using a slash command?

That works: "*check the citations in my brief*" runs `/verify`. The slash command is the sure way to get exactly the skill you mean.

Updates — how new features reach you, and how to use them

What this chapter is for: LVAI Pro improves often. This chapter says how you find out, what (if anything) you have to do, and how to start using a new command the same day.

A. Two kinds of updates

Kind	What changed	What you do
An existing command got better	The instructions behind a command (how <code>/verify</code> checks, what <code>/closing-docs</code> produces, a new form in <code>/fill-form</code>). These live on the Legal Velocity connector, not on your computer.	Nothing. The next time you run the command it is already the new version. You get an email saying what changed so you know what to expect.
A new command was added	The list of commands in Claude's message box is the plugin file on your computer. A new command (for example <code>/exhibits</code>) is not in the list until you install the new file.	One minute: the email has a download button; follow section B.

B. The update email, step by step

Every update comes as an email from **admin@legalvelocity.ai** with the subject "**LVAI Pro update: <title>**". It says what is new, in plain words, and whether you need the new plugin file. If it does not say so, you are done reading. If it does:

- 1 Click the blue **Download lvai-pro.plugin** button in the email. The file lands in your **Downloads** folder (if the browser asks whether to keep it, click **Keep**).
- 2 In Claude Desktop: your initials (bottom-left) → **Settings** → under Customize, **Plugins** (Part 1, picture 14).
- 3 Find **LVAI Pro** on the **Yours** tab: open the plugin → ⋮ → **Remove**. Yes, remove it — your connector, your license and your settings are not in the plugin, so nothing is lost.

- 4 Then install the new file: **+ Add** → **Upload plugin** → choose `lvai-pro.plugin` in Downloads → **Open** → **Install**. The row LVAI Pro is back.
- 5 Close Settings, start a Cowork session, type `/` — the new command is in the list.

★ **Which version do I have?** The LVAI Pro row on the Plugins page may show a version number (for example `13.5.0`), but not every version of Claude Desktop shows one. The update email always says the version; if in doubt, install the file — installing the same version again is harmless.

C. Using a new command the same day

- 1 Read its chapter. Every command has one in Part 3 of this manual — and the manual is re-issued with every update: the email links the latest PDF, it is always at **legalvelocity.ai/manual**, and the PDF itself is at `https://lvai-license-server.legalvelocity.workers.dev/public/LVAI-Pro-Manual.pdf`. The chapter tells you what to put in the folder, the exact words to type, and what comes back.
- 2 Try it on something small first — one certification with two exhibits, one short brief — and read the result end to end, the way Part 3 says to.
- 3 If the command is not in the `/` list even after installing: remove the plugin and install the file again (section B, steps 3–4), then restart Claude Desktop. If it is still missing, email `admin@legalvelocity.ai` with a screenshot of your Plugins page.

D. Missed an email?

The links never change. The current manual:

`https://lvai-license-server.legalvelocity.workers.dev/public/LVAI-Pro-Manual.pdf` (also the "Manual" link at the bottom of **legalvelocity.ai**). The current plugin file: `https://lvai-license-server.legalvelocity.workers.dev/public/lvai-pro.plugin` — the same file the "Download lvai-pro.plugin" button in your original setup email points to. Installing that file at any time gives you the latest command list; you cannot install an older one by mistake.

E. What changed in version 13.5.0 (September 2026)

Every change below is of the first kind in section A — an existing command got better — so it reaches you through the connector the next time you run the command. The plugin file is 13.5.0 and the command list is unchanged (twenty commands); install the new file only if the update email asks you to.

Command	What changed	What you do
/research /deep-research /case-summary	The memo is always written to a file in your case folder — <code>Research memo - <topic>.md</code> — and passes the integrity check before Claude shows you anything. There is no longer a chat-only answer that skips the check. (Chapters 13–15)	Choose a case folder before you start, even for quick research. The memo opens in Word or any text editor.
The integrity check (every research command)	Now also verifies each case's name and year against the verified record, block quotations (indented quotes), short-form citations (" <i>Brill</i> , 142 N.J. at 540"), "In re" / "Matter of" cases and quotations marked "(citation omitted)". Subsequent history ("certif. denied ...") is written only when the service confirmed it. A reporter the check does not recognise is flagged. (Chapter 13)	Nothing. Read the integrity line at the end of each delivery note.
/verify	Accepts a PDF brief (its text is extracted first). The report is a Word document, and also a PDF when LibreOffice is installed. (Chapter 16)	Name the PDF in the request. A scanned PDF still has to be converted to Word first.
/correct	A citation that cannot be verified is never removed silently: it stays with a Word comment, or — if you ask for unverifiable citations to be taken out — it is annotated <code>[FLAGGED – <case>: not verified on <service>; verify manually or remove; original: <...>]</code> . Running <code>/correct</code> twice is safe. The corrected brief is checked in a mode that never exempts ordinary paragraphs. (Chapter 17)	Read the delivery note's list of unverified citations; search the corrected brief for "FLAGGED".

Command	What changed	What you do
/hyperlink	With both connectors, a case Midpage cannot find is looked up on Descrybe and linked there, and the summary says so; the browser fallback comes after that. New Jersey's lettered statute chapters (N.J.S.A. 40:55D-70, 46:8B-1, 39:6A-4) and the California codes now resolve. (Chapter 19)	Run /hyperlink again on a brief whose lettered-chapter or California citations were left unlinked.
/exhibits /exhibit-binder	References to exhibits of <i>other</i> documents ("attached as Exhibit B to the Complaint") are listed separately as "mentioned, not attached" and never matched to files. A certification with unaccepted tracked changes is printed with the changes accepted, with a warning. Files of any type in the exhibits folder are listed, with a note for the types that must be saved as PDF (HEIC, .msg/.eml, .xlsx). The binder's page stamp sits lower, on a white box; its position and offset can be changed. (Chapter 22)	Accept or reject tracked changes in Word first; save the listed files as PDF; say "put the page stamp higher" if an exhibit needs it.
/prepare-rider	New Jersey seller's rider: flood-risk disclosure (N.J.S.A. 56:8-19.2) and, for a house built before 1978, the lead-based paint disclosure. Both New Jersey riders: a Bulk Sale Act clause (Form C-9600, 10 business days) and a rewritten attorney-review clause. New York condo and co-op riders drop the Property Condition Disclosure paragraph (RPL § 461(5)(b)). (Chapter 24)	Read the new clauses in your next rider; delete what does not fit the deal.
/closing-docs	The New York closing package has its own Affidavit of Title. The FIRPTA affidavit comes in an individual and an entity version. (Chapter 27)	Check that the FIRPTA version fits the seller.
/fill-form	New Jersey CIS: "Date of Divorce" is filled only post-judgment. (Chapter 29)	Nothing.
/license and billing	Cancelling stops future charges and the license runs to its paid-through date. Adding a seat in the billing portal issues the new seat automatically and emails its setup guide. The setup-reminder email's test is now "Check my LVAI Pro license status". (Chapter 31)	Nothing. Billing changes are made from the primary seat.

Cheat sheet — one page to keep by the keyboard

Every session

1. Claude Desktop → **Cowork** · 2. model button → **Opus 5.5** → Effort → **Max** (recommended for complex work) · 3. **Project or folder** → **Add folder** (the case folder, with the files in it) · 4. **+** → **Connectors**: Legal Velocity on, Midpage/Describe on · 5. approvals button → **Automatically approve** · 6. type `/lvai-pro`, pick the command, say what you want, **Enter**.

Command	Give it	Get back
<code>/lvai-pro:research</code>	the question, jurisdiction, posture, facts	a verified memo: Research memo - <topic>.md
<code>/lvai-pro:deep-research</code>	the same, for a hard or high-stakes issue	an exhaustive memo, same file name
<code>/lvai-pro:case-summary</code>	a case name or citation	a case brief with treatment, as a memo file
<code>/lvai-pro:verify</code>	a brief (.docx/.pdf)	Citation Verification Report .docx + .csv (+ .pdf with LibreOffice), with a verification certificate
<code>/lvai-pro:correct</code>	the brief + its report	<brief>_corrected.docx — tracked changes with comments, re-verified
<code>/lvai-pro:binder</code>	the brief + the caption	Citation Binder .docx — one tab per case
<code>/lvai-pro:hyperlink</code>	a .docx	<name>_hyperlinked.docx
<code>/lvai-pro:draft</code>	what to draft, court, the files to draft from	the document, in Word if you ask

Command	Give it	Get back
<code>/lvai-pro:discovery</code>	case type + facts, or the requests to answer	interrogatories / RFPs / RFAs, or responses
<code>/lvai-pro:exhibit-binder</code>	the Exhibits folder, order, labels, caption, Bates?	one tabbed, indexed, numbered PDF
<code>/lvai-pro:exhibits</code>	the certification + the exhibit files	certification with its exhibits tabbed behind it, plus one PDF per exhibit
<code>/lvai-pro:intake</code>	the contract and rider, your side	transaction summary, dates, next steps
<code>/lvai-pro:prepare-rider</code>	buyer/seller · residential/condo/co-op · NJ/NY	<address> - Buyer (Seller) Rider.docx
<code>/lvai-pro:calendar-dates</code>	the contract or the dates (calendar connected)	events on Google Calendar / Outlook
<code>/lvai-pro:title-review</code>	the title binder + the contract	Title Review Report (+ seller closing documents on request)
<code>/lvai-pro:closing-docs</code>	the deal's details, prior deed, block/lot	deed, affidavits, closing statement, RTF-1, GIT/REP (NJ) / TP-584, RP-5217 (NY)
<code>/lvai-pro:analyze-form</code>	a PDF form	the list of its fields
<code>/lvai-pro:fill-form</code>	the form + the source documents	the filled form + a source note
<code>/lvai-pro:extract-data</code>	tax returns, statements, paystubs	a table of every figure with its source
<code>/lvai-pro:license</code>	—	your license, expiry, status and the billing link for your plan



The order for a filing: research → draft → **verify** → correct → binder → hyperlink → exhibits / exhibit-binder. **Always verify before you file.**

Help: admin@legalvelocity.ai · www.legalvelocity.ai · Claude Desktop: claude.com/download · Midpage: app.midpage.ai · Descrybe: descrybe.com/connect

Glossary — the words, in plain English

Word	Meaning
Anthropic	The company that makes Claude.
Approvals (Manual / Automatic)	Whether Claude asks before each action in a Cowork session. Part 2, Chapter 12 B.
Bates numbers	Sequential numbers stamped on every page of a document production (SMITH-000001 ...) so any page can be identified. /exhibit-binder adds them on request.
Bookmarks (PDF)	The clickable table of contents in a PDF reader's side panel. The exhibit binder has one entry per exhibit.
Chat	Claude's plain conversation mode — no folder.
Citation Binder	The Word document /binder builds: index of authorities plus one tab per case with verified pull-quotes. Chapter 18.
Citation Verification Report	The Word report /verify builds (also a PDF when LibreOffice is installed, and a CSV): an At-a-glance table, every citation and statute in a brief checked against the source, and a verification certificate. Chapter 16.
Citator / treatment	What later courts did with a case: followed, distinguished, criticised, overruled. Reported by Midpage/Descrybe and shown in reports and binders.
Claude Desktop	The Claude program installed on your Mac or PC. Needed for Cowork. Part 1, Chapter 3.
Command (slash command)	A word typed after a <code>/</code> in the message box that starts a specific LVAI Pro skill, e.g. <code>/lvai-pro:verify</code> .
Connector	A link from Claude to an outside service: Legal Velocity, Midpage, Descrybe, Google Calendar. Added once in Settings; switched on per chat with + → Connectors.
Sign-in (Legal Velocity)	How Legal Velocity is connected: the email address on your license, a six-digit code emailed to it, your seat, Allow. No password, nothing to copy. Part 1, Chapter 6.
Cowork	Claude's mode for working inside a folder on your computer for minutes at a time. Part 2.
Descrybe	A legal-research service (descrybe.com) whose Legal Engine LVAI Pro can read opinions from. \$25/month.
.docx	A Microsoft Word file. Most LVAI Pro output is .docx; /hyperlink and /correct need .docx input.

Effort	How hard Claude works on each step: Low, Medium, High, Extra or Max, chosen in the model button's menu. Higher effort is more thorough but slower and uses more of your Claude plan. Legal Velocity AI recommends Max for complex legal work (Part 2, Chapter 9).
Folder (case folder)	The one folder per matter that Cowork works in. Part 2, Chapter 10.
Independent re-lookup	The second lookup of every cited case, by a separate sub-agent that sees only the list of citations. The integrity check requires the two lookups to agree. Chapter 16.
Legal Velocity connector	The connector in Claude's directory that delivers LVAI Pro's skills to Claude and checks your license. Part 1, Chapter 6.
License ID	Your LVAI Pro license number, LV-XXXX-XXXX. Quote it when you email support.
.lvai (folder)	A hidden folder the research and verification commands write into your case folder, holding the verification ledger of each run — the audit trail behind the integrity check — and, for /verify, the re-lookup record and the certificate data. Harmless; leave it or delete it when the matter closes. Part 2, Chapter 10.
Midpage	A legal-research service (midpage.ai) LVAI Pro can read opinions from. Free trial, then \$100/month.
Model	The version of Claude that does the work (Opus 5.5, Sonnet 5, Haiku 4.5 ...), chosen with the model button at the right of the message box. Legal Velocity AI recommends Opus 5.5 at Max effort for complex legal work (Part 2, Chapter 9).
Overextended	A verification status: the case is real but the brief claims more than the opinion holds.
Pinpoint (pin cite)	The exact page of the opinion a quotation or proposition comes from ("142 N.J. at 540").
Plugin	The small file <code>lvai-pro.plugin</code> that adds the LVAI Pro commands to Claude. Part 1, Chapter 7.
Primary seat	The first seat issued for a license. Billing changes (the Manage billing link in /license) are made from its Claude account. Chapter 31.
Pull-quote	A word-for-word passage from an opinion, quoted in the Citation Binder under the proposition it supports.
Seat	One person's right to use LVAI Pro — one Claude account at a time.
Skill	The detailed instructions behind each command, delivered live by the Legal Velocity connector.
Tab page	A full page reading "EXHIBIT A" (or "TAB 1") placed before each exhibit or authority in a binder.

Tracked change	An edit Word records rather than makes silently — deleted words struck through, new words underlined — for you to accept or reject (Review → Accept / Reject). /correct makes every fix this way. Chapter 17.
Verification certificate	The last page of a Citation Verification Report: what the integrity check established — services used, coverage, the re-lookup, the result. It is not a legal review. Chapter 16.
Verified	A citation status: the opinion was found on the research service and supports the proposition as stated.

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