Build a Shared AI Client Session Memory System

What This Builds

A shared AI client memory system that tracks and logs your client AI work so nothing is forgotten and billing is easy.

Benefits

As you add information to the client memory, Claude gets smarter about your case. It learns the facts, the caselaw you add, and -- if you use Claude to review files and filings -- it starts catching errors you might have missed.

I run every filing through a spelling and grammar check before it leaves the office. Since I instituted this system, Claude also checks the memory history and flags factual errors, citation errors, and more. I work faster, cleaner, better. And we push it all into MyCase so the client can see exactly what we're billing for.

How It Works

Two commands run the whole system:

Start client session -- Claude reads the active matter file and picks up where you left off. If there's no file yet, Claude finds the case in your practice management system and creates one.

Save client session -- Claude updates the file with the work done this session, archives the prior version with a timestamp, and posts a formatted note to your practice management system automatically.

Both commands work from context. If you've been working on a client in the conversation, you don't need to type a name. Claude knows who you're working on.

What You Need

An MCP server connection. Claude needs to be able to read and write files and run commands on the machine where client files will be stored. Set this up first if you haven't.

See: https://downloads.nemolegal.com/mcp-server-guide.md

Session memory already running. Client files plug into the same infrastructure.

See: https://downloads.nemolegal.com/session-memory-guide.md

A practice management API (optional). The auto-note feature requires an API endpoint that creates notes on a matter. Most modern platforms support this. If you're not ready, the file system works without it -- add the note push later.

A Note on Privacy

Your client session files are stored on your own server. The content of any Claude conversation is governed by the terms and conditions of your plan. Read and understand the terms, conditions, and data use practices before using any AI with client data.

For more on the legal landscape:

https://nemolegal.com/missouris-open-question-ai-discoverability-in-litigation/

https://x.com/compose/articles/edit/2040547200783077376

The law is unsettled. You have to make choices you feel you can defend.

The Prompt

Copy this entire block and paste it into Claude with your MCP server connected. Claude will examine your server and build the system.

I want to build a shared client session memory system for my law practice.

Every active client matter gets its own markdown file on my server.

Each file tracks: matter status, a dated work log, documents, next steps,

flags for attorney and staff, and freeform notes.

Files live at: [your session memory directory]/clients/active/LASTNAME-FIRSTNAME/MATTER-SLUG.md

Archives: [your session memory directory]/clients/archive/LASTNAME-FIRSTNAME/MATTER-SLUG/YYYY-MM-DD-HHMM.md

Archives are chmod 444 -- immutable, never overwritten.

Two commands drive the system:

"Start client session:" -- Read the active matter file and confirm current

state. If no file exists, search the practice management cache for the

client, create the folder and file from the template, and confirm. No name

needed if you already know who we're working on from context.

"Save client session:" -- Update the active file (work log, status, next

steps, flags), archive the prior version with a timestamp, run the push

script to post a formatted HTML note to the practice management system,

and confirm: "Saved -> archived -> Note ID XXXXXX" -- or report exactly

why the push failed with a retry command.

Please:

1. Examine my server and find where my session memory directory lives
2. Create the clients/active/ and clients/archive/ directory structure
3. Write a client file template -- show me before saving
4. Build a Node.js push script that parses the client file, renders the sections as clean HTML, and POSTs a formatted note to my practice management system's API -- with auto token refresh on 401, and distinct exit codes for local errors vs. API failures
5. Add a standing order to my session-current.md documenting the system -- archive the current session-current.md first, then append
6. Set up Espanso shortcuts on every machine you can reach:

;scs -> Start client session:

;save -> Save client session:

7. Create a one-page staff cheatsheet at clients/STAFF-CHEATSHEET.md

Work one step at a time. Show me what you're going to do before doing it.

What the Client File Looks Like

CLIENT SESSION -- SMITH, Robert / ESTATE-PLAN

Case ID (internal): 47291033

Matter Type: Estate Planning -- Revocable Trust Package

Opened: 2026-03-15 | Last Updated: 2026-04-07 10:30 CT | Updated By: Attorney

MATTER STATUS

Revocable trust package in drafting phase. Client is married, two adult children, one minor grandchild with special needs. Trustee succession confirmed. Pour-over will and healthcare documents drafted and sent for review. Waiting on client feedback before scheduling signing.

WORK LOG

2026-04-07 -- Attorney

- Reviewed client questionnaire responses
- Drafted revocable trust, pour-over will, durable POA, HCPOA
- Identified SNT sub-trust needed for minor grandchild -- flagged for separate matter discussion

DOCUMENTS

2026-04-07 Revocable Living Trust Drafted -- sent for review

2026-04-07 Pour-Over Will Drafted -- sent for review

2026-04-07 Durable Power of Attorney Drafted -- sent for review

2026-04-07 Healthcare Power of Attorney Drafted -- sent for review

NEXT STEPS

[ ] Client to review draft documents -- Client

[ ] Schedule signing once feedback received -- Staff

[ ] Discuss SNT sub-trust for grandchild at signing -- Attorney

FLAGS

Attorney: Grandchild has special needs -- SNT language needed if client wants to leave anything to grandchild directly. Raise at signing.

Staff: Confirmation email sent 4/7. Follow up if no response by 4/14.

NOTES

Robert and Margaret Smith, married 34 years. Two adult children (James, Lisa). Minor grandchild (Tyler, age 9) has Down syndrome. Client prefers email. Referred by former client Dan Porter.

What the Practice Management Note Looks Like

Every save posts this to the case automatically:

SUBJECT: AI Session Note -- 2026-04-07

Matter Type: Estate Planning -- Revocable Trust Package

Updated By: Attorney

MATTER STATUS

Revocable trust package in drafting phase. Client married, two adult children, one minor grandchild with special needs. Documents drafted and sent for review. Waiting on client feedback.

WORK THIS SESSION

- Reviewed client questionnaire responses
- Drafted revocable trust, pour-over will, durable POA, HCPOA
- Identified SNT sub-trust needed for minor grandchild

DOCUMENTS

2026-04-07 Revocable Living Trust Drafted -- sent for review

2026-04-07 Pour-Over Will Drafted -- sent for review

NEXT STEPS

- Client to review drafts -- Client
- Schedule signing once feedback received -- Staff
- Discuss SNT sub-trust at signing -- Attorney

FLAGS

Attorney: Grandchild has special needs -- SNT language needed. Raise at signing.

Staff: Follow up if no client response by 4/14.

Posted by: AI Session System

How the Archive Works

Every save archives the prior version before overwriting:

clients/archive/SMITH-Robert/ESTATE-PLAN/

2026-04-07-1030.md snapshot before today's save

2026-04-03-1445.md prior session

2026-03-20-0915.md intake session

Each file is chmod 444 -- read-only, timestamped, permanent.

More resources:

Building an MCP Server: https://downloads.nemolegal.com/mcp-server-guide.md

Session Memory Guide: https://downloads.nemolegal.com/session-memory-guide.md

Tools and guides: https://nemolegal.com/tools/

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This guide was written by Patrick Nolan and Claude.