

TEXAS BAR CLE

CO-PILOTING MICROSOFT COPILOT FOR FAMILY LAWYERS



Copilot

Competence • Confidentiality • Verification • Judgment



Presented by

REGINALD A. HIRSCH

Law Office of Reginald A. Hirsch

State Bar of Texas • Advanced Family Law • Chapter 68



52ND ANNUAL

ADVANCED FAMILY LAW



August 10–13, 2026

San Antonio



VERIFY AND THEN TRUST

Copilot drafts. You decide.

30-Minute CLE Flight Plan

A practical, ethics-centered tour for Texas family lawyers.



Why Copilot Matters in Family Law

The value is reducing information overload without surrendering judgment.



The opportunity

Summarize, organize, draft first passes, and streamline administrative work.



The risk

Confidentiality, hallucinated authorities, inaccurate facts, and overreliance.

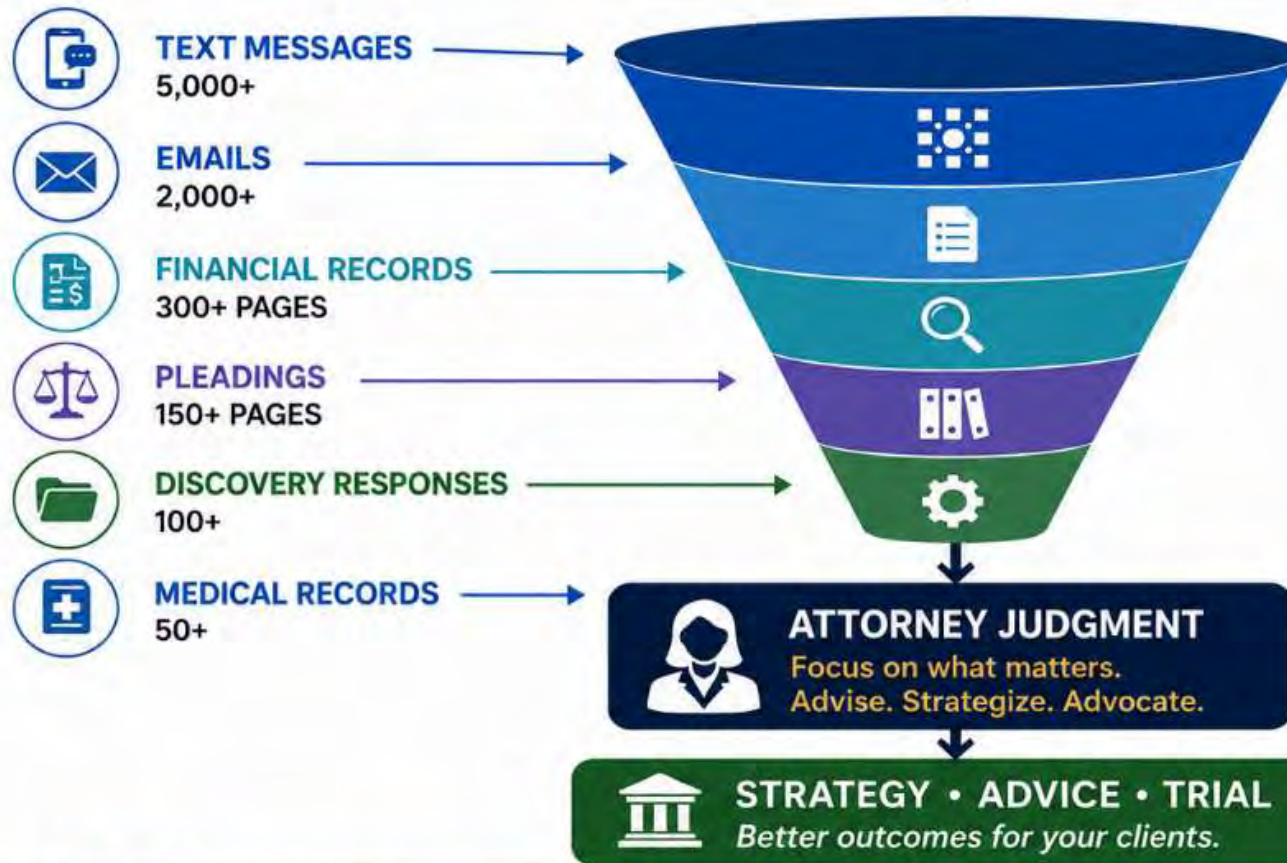


The lawyer's role

Use Copilot as an assistant. Responsibility remains with the attorney.



FAMILY LAW IS VOLUME.



COPILOT HELPS

- ✓ Organize
- ✓ Summarize
- ✓ Draft
- ✓ Analyze



LAWYERS STILL

- ✓ Exercise Judgment
- ✓ Advise Clients
- ✓ Try Cases
- ✓ Make Decisions



Copilot reduces information overload

It does not replace legal judgment.



So Many Copilots: Which One Belongs in a Law Firm?

The distinction is governance, security, and integration.

 Copilot Free	 Copilot Pro	 Microsoft 365 Copilot <i>RECOMMENDED</i>
 Consumer-grade AI chat	 Individual productivity	 Enterprise Microsoft 365 integration
 Useful for learning	 Helpful for drafting and organizing	 Permissions, governance, and data protection
 Not for client confidences	 Still consumer-oriented for legal practice	 Built for security, compliance, and oversight
 Good for exploring. Not for practicing.	 Better for you. Not enough for your clients.	 Built for your firm. Trusted for your clients.



PLAN 3 OF 3

Microsoft 365 Copilot Business add-on

Add Copilot to an existing eligible Microsoft 365 Business plan; useful for targeted, role-based rollout.



\$18.00

user/month, paid yearly;
business plan required



**BEST FOR
TARGETED SEATS**

What is included



Requires a Microsoft 365 Business plan to purchase Microsoft 365 Copilot Business.



Copilot in Word, Excel, PowerPoint, Outlook, and Teams;
AI-powered chat powered by Work IQ.



Reasoning AI for research and data analysis; pre-built agents
including Researcher, Analyst, and Facilitator.



Analytics to measure adoption, usage, and business impact;
LLM model choice.



**Use as a pilot license: start with partners, senior associates,
heavy email users, and paralegals who work in
Word/Outlook/Teams daily.**



Business Standard with Copilot

Powerful Office apps across devices with Copilot built in, but without the Premium security stack.

\$23.50

user/month, paid yearly



BEST FOR CORE PRODUCTIVITY

What is included



Copilot in Word, Excel, PowerPoint, Outlook, and Teams.



AI-powered chat connected to work data and access to reasoning AI for research and data analysis.



Identity/access management for up to 300 users, custom business email, Teams, and 1 TB cloud storage per user.



Includes additional business apps and automatic spam and malware filtering.



Choose Standard when lawyers need full desktop apps plus Copilot, and security/compliance controls are handled elsewhere.



PLAN 1 OF 3

Business Premium with Copilot

Integrated productivity, Copilot, and advanced security
for firms handling confidential client data.

\$32.00

user/month, paid yearly



BEST FOR SECURITY-CONSCIOUS FIRMS



What is included



Copilot in Word, Excel, PowerPoint, Outlook, and Teams.



AI-powered chat connected to work data;
reasoning AI for research and data analysis.



Web, mobile, and desktop Office apps, Teams,
business email, and 1 TB cloud storage per user.



Advanced identity/access management,
enhanced cyberthreat protection, and
discovery/classification/protection of sensitive data.



**Choose Premium when confidentiality, security controls,
and compliance readiness are part of the buying decision.**



Work Mode vs. Web Mode

Know what data Copilot can see before prompting.



WORK

Firm emails, documents, calendars, Teams, OneDrive, and SharePoint subject to permissions.



Private. Protected. Permission-based.



WEB

Publicly available information. Useful, but not the same organizational context.



Public. Broad. Context-limited.



AI Does Not Change Your Duties

The ethical question is how lawyers use AI.



Competence

Know limits and hallucination risks.
TDRPC 1.01



Confidentiality

Protect client information.
TDRPC 1.05



Candor & Accuracy

Verify before filing.
TDRPC 3.01 / 3.03 / 3.04



Supervision

Train staff and review work.
TDRPC 5.01 / 5.03



Texas Ethics Opinion 705: The Short Version

The lawyer remains responsible.

**01****Understand tool limits.**

Know what AI can and cannot do.

**02****Evaluate security and data-handling practices.**

Protect client data and evaluate your tools.

**03****Independently verify AI-generated content.**

Check accuracy, sources, and citations.

**04****Remain responsible for work product.**

The lawyer is accountable for the final result.



Verify and Then Trust

Move verification before reliance.



VERIFY FIRST

Don't assume. Confirm.



Every citation.

Check sources and authority.



Every quote.

Confirm accuracy and context.



Every factual claim.

Validate facts and evidence.



Every calculation.

Recalculate and verify.



THEN TRUST

After diligent verification,
you can rely with confidence.



**Due diligence today.
Confidence tomorrow.**



Check the Instruments Before You Prompt

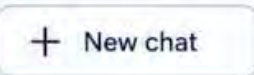
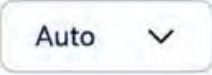
The first skill is knowing the environment.



PRE-FLIGHT CHECK


- 
New Chat
 Start a clean, matter-specific conversation.
- 
Work or Web?
 Confirm you're in the correct environment.
- 
Attach Files
 Provide the documents you want analyzed.
- 
Reasoning Mode
 Auto for most tasks.
 Think Deeper for complex legal analysis.
- 
Voice (Optional)
 Use dictation when it's faster than typing.


Copilot


- 
 + New chat
- 
 Work Web
- 
 + Add content
 Attach files, numbers, and more
- 
 Message Copilot
- 
- 
 Auto



**BEFORE EVERY PROMPT,
ASK YOURSELF:**



Am I in the
right environment?



Am I using the
right documents?



Am I using the
right reasoning mode?

Treat Copilot Like a Junior Associate

Better instructions produce better first drafts.



“Analyze this case.”



Too vague.

Copilot doesn't know what you need.



No role or perspective.

Missing the lens for analysis.



No boundaries.

May overreach or miss key limits.



No output guidance.

Unclear format leads to unusable results.



More revision required.

You'll spend more time editing.

VS.



Context + issue + documents + format + limits



Give context.

Tell Copilot the background and why it matters.



Identify the issue.

Be specific about the legal question.



Attach documents.

Give Copilot the source material to analyze.



Specify output format.

Tell Copilot how you want the answer structured.



Set limits and boundaries.

Define jurisdiction, scope, and what not to do.



Review, refine, verify.

Iterate until the answer is right.



Clear instructions. Complete information. Defined output.
That's how you get work product you can trust.

THE PROMPT FORMULA

(WORKS EVERY TIME)



GOAL

What you need
Copilot to do

+



CONTEXT

Key facts, parties,
and status

+



TEXAS LAW

Cite the right statutes
and legal standards

+



FORMAT

How you want
the output



1. ASK FOR STRUCTURE, NOT CONCLUSIONS.



2. THEN REFINE.

SHORTEN / FORMALIZE / ADD HEADINGS



★ BETTER PROMPTS. BETTER RESULTS. ★

Practical Family Law Prompts

Use Copilot to structure the work and focus on what matters.



1. Mediation Prep

YOU GIVE COPILOT



Inventory of assets and liabilities + proposed settlement terms.



COPILOT GIVES YOU

- ✓ Key arguments and leverage points
- ✓ Negotiation risks and red flags
- ✓ Missing issues to address
- ✓ Mediation talking points



2. Discovery Review

YOU GIVE COPILOT



Discovery responses and production.



COPILOT GIVES YOU

- ✓ Deficiencies and inconsistencies
- ✓ Missing documents and details
- ✓ Follow-up discovery to request
- ✓ Motion to Compel outline



3. Temporary Orders

YOU GIVE COPILOT



Temporary Orders affidavit and supporting documents.



COPILOT GIVES YOU

- ✓ Key issues and legal questions
- ✓ Topics for cross-examination
- ✓ Gaps in evidence and proof
- ✓ Additional evidence to obtain



4. Billing / Email Review

YOU GIVE COPILOT



Emails by date range or client/matter.



COPILOT GIVES YOU

- ✓ Estimated time spent by email and by matter
- ✓ Summary of work performed
- ✓ Helps you track and reconstruct billable time with confidence



Great results start with great input.

Provide the right information up front to get practical, actionable output.



QC / STOP Is Your Pre-Filing Checklist

The shortcut is simple, but the discipline matters.



QC

Quality Control

- ✓ **Accuracy** – Verify all facts and legal statements.
- ✓ **Completeness** – Confirm nothing material is missing.
- ✓ **Internal consistency** – Ensure the document is logically sound throughout.
- ✓ **Real citations** – Check case law, statutes, and authority.
- ✓ **Correct formatting** – Follow court and local rules.
- ✓ **Support** – Make sure arguments are backed by evidence and law.



STOP

Sanity Test / Uncertainty Check

- ✗ If authority, fact, citation, or calculation cannot be verified – stop.
- ✗ Do not guess.
- ✗ Identify uncertainty.
- ✗ Confirm before you file.



Put both QC and STOP at the end of every legal prompt.

Better checks. Fewer mistakes. Stronger filings.



FIRM ROLLOUT

A 5-STEP PLAYBOOK

1



START WITH
LOW-RISK
USE CASES

2



USE MATTER
WORKSPACES
+ LEAST
PRIVILEGE

3



TRAIN
PROMPT
PATTERNS

4



CREATE
VERIFICATION
PROTOCOLS

5



DOCUMENT
POLICY
+
SUPERVISION



START SMALL.
SCALE ONLY AFTER YOU
TRUST THE WORKFLOW.



Convert a Weak Prompt into a Lawyer Prompt

A live exercise for the CLE room.



WEAK PROMPT

Too vague. Missing key information.

“

“Help me prepare for mediation.”



WHAT'S MISSING?

- ✗ No context about the case
- ✗ No role or perspective
- ✗ No jurisdiction or legal framework
- ✗ No constraints or format
- ✗ No QC/STOP instruction



LAWYER PROMPT

Specific. Complete. Actionable.

“

Context + role + Texas law + constraints + format + QC/STOP



WHY IT WORKS

- ✓ Provides the background and purpose
- ✓ Sets your role and perspective
- ✓ Anchors the response in Texas law
- ✓ Defines limits and desired output
- ✓ Includes QC/STOP for reliability



THE LAWYER PROMPT FORMULA



Context

+



Role

+



Texas Law

+



Constraints

+



Format

+



QC/STOP

LANDING CHECKLIST

What Lawyers Should Remember

*Copilot is powerful,
but a law license still
requires **human judgment**.*



Choose enterprise-grade tools
for client matters.



Stay in the approved firm environment.



**Prompt with context, task,
constraints, and format.**



**Verify every legal authority, factual claim,
quotation, and calculation.**



**Use QC/STOP and preserve
professional judgment.**



Copilot is your assistant.
You are the attorney.



5 Hot Tips for Using Gen AI

Small actions. Big impact.



1. PROTECT CONFIDENTIALITY

Use approved, enterprise-grade tools and never share confidential client information.



2. GIVE CLEAR DIRECTION

Provide context, role, task, constraints, and format so Copilot can deliver relevant results.



3. VERIFY EVERYTHING

Double-check legal authority, factual claims, quotations, and calculations every time.



4. USE QC/STOP

Quality control and sanity checks help catch mistakes before they become problems.



5. YOU ARE STILL THE LAWYER

AI is a powerful assistant—not a replacement. Your judgment, ethics, and strategy make the difference.

TIP #1

— THE GOLDEN RULE —

VERIFY AND THEN TRUST



AUTHORITIES



QUOTATIONS



FACTS



CALCULATIONS



EVERY AI DRAFT SHOULD BE REVIEWED BEFORE
IT BECOMES YOUR WORK PRODUCT.



THE LAWYER—
NOT THE AI—
IS RESPONSIBLE.

CONSEQUENCES

Why Verification Matters

Texas courts have already warned lawyers about AI-generated citations.



**AI Hallucinations
Can Cost You
Your Credibility.**



2026

First Court of Appeals
Houston

Chief Justice Terry Adams

No. 01-26-00319-CV

In a concurring opinion, Chief Justice Terry Adams wrote:

“I write separately to note that the mandamus petition here has attributions and quotations to caselaw which strongly appear to be AI-fabricated hallucinations.”

“AI-fabricated hallucinations.”

“Filing a document in our Court with fictitious or misleading citations—whether generated by AI and not checked by a human, or otherwise—is a serious breach of candor that this Court cannot tolerate.”

“A serious breach of candor.”

See TEX. R. APP. P. 38.1, 38.9; *Schlafly v. Schlafly*, 33 S.W.3d 863, 873 (Tex. App.—Houston [14th Dist.] 2000, pet. denied).

“Citing nonexistent case law or misrepresenting the holdings of a case is making a false statement to a court. It does not matter if AI told you so.”

“False statement to the Court.”

Counsel who appear before this Court and use AI for legal research must do so with great care. Always *‘trust and verify’* the accuracy and validity of your results. ... And that unfortunately will require the Court to take the necessary corrective action including, but not limited to, striking the offending brief and reporting counsel to the State Bar.”



Verify every citation before filing.

Your signature—not Copilot’s—is on the pleading.

THE CONSEQUENCES ARE REAL



Texas lawyers are now being **personally sanctioned** for failing to verify AI-generated legal citations.



In the Interest of S.M.T.
14th Court of Appeals (Houston)
July 30, 2026

“

Although appellee did not request sanctions, on our own motion we order attorney [REDACTED] to attend **three hours of Continuing Legal Education on the dangers of the use of artificial intelligence in court filings** and certify compliance within sixty days of this opinion.”

— *In the Interest of S.M.T.*, 2026 Tex. App. LEXIS 7142, at *21 (Tex. App.—Houston 14th Dist.) (July 30, 2026).



MANDATORY AI CLE

Three additional hours of live or remote CLE on the dangers of using AI in court filings.



COURT-IMPOSED SANCTION

Ordered on the court's own motion—even without a request from the other party.



ATTORNEY PERSONALLY RESPONSIBLE

The sanction is directed to counsel, not the client. You are accountable.



Courts are no longer simply warning lawyers—they are **sanctioning** them.

TIP #2

When You Feel
Like This on
MONDAY ...



DROWNING IN EMAILS?



OVERWHELMED

Too many emails,
not enough time.



LET AI HELP

Copilot can triage,
summarize, and
prioritize.



FOCUS FIRST

Handle what matters
most—fast.



SAVE HOURS

Reclaim your week
and your sanity.



AI won't do your job for you. **But it can help you do it faster and smarter.**

TIP #2

Try This Prompt (MS365Pro)



**Summarize my
Unread Emails in
My Outlook
Inbox* Folder.**



*** You can change
the Inbox folder
to a different
Folder.**



Save time. Get clarity. Start your day in control.

TIP #3

When You are Reviewing Your Billing



TIP #3

Recover Lost Billable Time



Try this prompt in Microsoft 365 Copilot



Review my Outlook emails, calendar appointments, Teams meetings, Word documents, and Microsoft 365 activity for **Jane Doe** between **July 1** and **July 31, 2026**.



Build a chronological timeline of all client work.



For each activity:

- suggest a billing description
- estimate a reasonable amount of billable time
- identify gaps where work appears to have occurred but no time may have been entered
- combine related emails into a single billing entry where appropriate



Output the results as **draft time entries** for my review.



Let Copilot do the digging—so you can focus on delivering value.
Capture more. Miss less. Bill with confidence.

TIP #4

Avoiding Again the Endless Prompting



A smarter prompting workflow saves time, boosts accuracy, and delivers better results every time.



Better prompts. Better output. Every time.

Small improvements in your prompts lead to big gains in results.

TIP #4

Don't Close Your Final Response

One smart prompt can replace a dozen rounds of revisions.



After multiple revisions, you finally got the response you wanted.

TRY THIS PROMPT:



Convert all of those instructions into a single expert-level prompt that would reproduce the final result without requiring any follow-up corrections.

Add a QC/STOP section that prevents the common errors that required correction during this conversation.



QC/STOP: Built-in Quality Control

- | | |
|---|--|
| ✓ Verify all requirements are addressed | ✓ Ensure proper formatting and structure |
| ✓ Confirm accuracy of facts and figures | ✓ Validate citations and sources |
| ✓ Check for completeness and relevance | ✓ Confirm tone and intent are correct |



STOP when all checks pass.

Do not deliver until every item is verified.

TIP #5:

What the heck is QC/Stop?

Why should I always use it in MS365 Copilot?



QC (Quality Control):

Before finalizing, review your response for accuracy, completeness, and internal consistency. Confirm that all legal authorities and citations are real, correctly formatted, and support the propositions stated.



STOP:

If any authority, citation, factual assertion, or calculation cannot be verified with confidence, do not guess or fabricate information. Clearly identify the uncertainty and indicate that independent verification is required.



This simple addition takes only a few seconds and often produces noticeably **stronger** and **more reliable output**.



QC/STOP helps you deliver responses you can trust.
Accurate. Verifiable. Reliable. Every time.