



# AI Essentials Copilot

## *Live Online Course*

### **COURSE OUTLINE**

Artificial intelligence is rapidly reshaping legal practice, with opportunities to lighten workloads, enhance impact, and uphold ethical practice. This hands-on, beginner-friendly course offers participants the skills to use Microsoft 365 Copilot *today*, to improve writing, streamline office work, reduce research time, and build safe workflows.

#### **Who Should Take This Course**

This course is designed for immigration attorneys and legal professionals who want to integrate practical and ethical AI techniques into their work. No prior AI experience is necessary.

#### **What to Expect**

The program consists of three discussion panels and an optional, one-on-one Skills Building Office Hours session, presented over three weeks.

- Three 90-minute web seminars, including:
  - Lectures
  - Demonstrations and guided practice
  - Q&A
- Hands-on experience using Microsoft 365 Copilot
- Optional Skills Building Office Hours for one-on-one feedback with course instructors
- Course materials, including templates for prompt writing
- AILA Course Discussion Board
- Access to recordings of webinars

#### **Suggested Tech Platform**

- The course instructors will use Microsoft 365 Copilot as the AI tech platform throughout the course
- While not required, access to Microsoft 365 Copilot is strongly recommended to fully benefit from the instruction
- Microsoft 365 Copilot is a paid product

- Account registration and payment are the individual responsibility of course participants. Subscription fees vary. New users typically can participate in a one-month free subscription trial.

## **Session 1**

**Tuesday, April 28, 2026**

**1:00 pm ET**

### **Where and How to Use Copilot in Your Practice**

Copilot is integrated into all the major applications in Microsoft Office 365: Word, Outlook, Teams, the browser, and mobile apps. Each location serves a different purpose. Learn where to start, essential time-saving tasks, and how to protect client confidentiality while building an ethical firmwide framework.

- Identifying Copilot entry points in Microsoft Office 365
- Safely handling client data
- Crafting your firm's AI use policy
- Quick wins for beginners
- Teaching your team to use AI ethically
- Simple research tasks in Teams and Edge

*Faculty:*

*Charity Anastasio (DL), Practice and Ethics Counsel, AILA Practice and Professionalism Center, Washington, D.C.*

*Reid Trautz, Senior Director, AILA Practice and Professionalism Center, Washington, D.C.*

## **Session 2**

**Thursday, April 30, 2026**

**1:00 pm ET**

### **Level Up Your Writing: Copilot in Word and Outlook**

Copilot can help refine your writing, reorganize complex client explanations, and build first drafts based on your unique samples, not generic templates. Learn how to stay in control while letting AI handle the heavy lifting.

- Summarize long email threads
- Draft and edit client communications
- Create fresh drafts from your existing documents
- Collaborative writing with AI (immigration-focused demos)
  - Compose RFE response explanations
  - Draft polished immigration support letters and documentation
- How to spot errors and avoid AI overconfidence

*Faculty:*

*Charity Anastasio (DL), Practice and Ethics Counsel, AILA Practice and Professionalism Center, Washington, D.C.*

*Elizabeth Rompf Bruen, AILA Board of Directors, Chicago, IL*

*Catherine Sanders Reach, Director, Center for Practice Management at North Carolina Bar Association, Cary, NC*

**Skills Building Office Hours (Optional)**

**Tuesday, May 5 | Thursday, May 7**

Sign up for a 20-minute, one-on-one skills building session to ask questions and get tailored coaching from a course instructor to build your confidence and improve your process. This special opportunity has limited space available and is included in the cost of the course. Registration for the Skills Building Office Hours will be available on Wednesday, April 29 at noon.

**Session 3**

**Tuesday, May 12, 2026**

**1:00 pm ET**

**Automating Workflow: Using Copilot in Other Microsoft Apps**

Build skills to elevate your research, data management, and presentation work, without needing to learn formulas or design theory.

- Using Copilot in Excel to analyze case metrics or KPIs
- Designing slide decks with Copilot
- Building simple AI agents for research tasks
- Using AI to generate visuals and diagrams ethically
- Creating internal tools (e.g., an HR chatbot for staff questions)

*Faculty:*

*Charity Anastasio (DL), Practice and Ethics Counsel, AILA Practice and Professionalism Center, Washington, D.C.*

*Jeffrey A. Devore, Palm Beach Gardens, FL*

*Jared Jaskot, Baltimore, MD*