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# Lexis+ AI<sup>™</sup> Canada Law School Faculty Guide

This is a faculty guide to Lexis+ AI, providing information on faculty and student access, product information and user resources, and classroom integration tips.

Lexis+ AI law faculty training sessions will provide you with full information on Lexis+ AI. Please register <u>here</u> for an upcoming training session.

For ongoing updates about Lexis+ AI in Canadian law schools, visit the Lexis+ AI Law Faculty webpage.

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#### Introducing Lexis+ AI in Canadian Law Schools

As of July 2024, Lexis+ AI is commercially available to Canadian legal professionals. This follows a successful preview with select Canadian customers and earlier commercial launches of Lexis+ AI in the USA, UK, Australia and France. Developed with input from leading law firms, Lexis+ AI is a generative AI legal assistant that transforms legal work through conversational search and intelligent legal drafting.

Lexis+ AI has been widely available at American law schools since December 2023, where 78% of law school faculty surveyed this past spring reported plans to teach students about generative AI tools. LexisNexis® Canada is committed to the success of new lawyers and is excited to bring this groundbreaking tool to Canadian law schools this fall.



#### **Law School Access Dates**

Lexis+ AI will be launched in stages, with law school faculty gaining access in advance of law students. If you are a registered Lexis+™ Canada law school user, look out for an email confirming the access start dates for your school. For more information on access, contact lawschools@lexisnexis.ca.

#### Account Integration for Existing Lexis+™ Canada Accounts

Current Lexis+ Canada users will automatically gain access to Lexis+ AI on the access date for their school, and can login using their existing Lexis+ Canada ID.

- Login Now
- Forgot Password

### **New Account Registrations**

To prevent unauthorized access to LexisNexis services, note that the law school self-registration page will no longer be accessible through the public LexisNexis website. New law school users must request and obtain a private Lexis+ AI registration link from an authorized person. Authorized persons include Law School Librarians and Faculty, LexisNexis Student Associates, LexisNexis Customer Service, or our LexisNexis Law School Program Manager. All new accounts must be created using a valid law school email address.

Upon request, LexisNexis can email groups of incoming or existing law students directly with the private registration link. Please email <u>lawschools@lexisnexis.ca</u>to make a request.

#### Lexis+ AI Faculty Training

Lexis+ AI law faculty training sessions will cover the Lexis+ AI features, best practices, and classroom integration strategies. Please register <u>HERE</u> for an upcoming training session and continue to visit <u>this page</u> regularly for additional training dates.

Customized training sessions for your law school are available and can be scheduled by emailing training@lexisnexis.ca.

#### **Law Student Training**

While AI tools like Lexis+ AI offer powerful capabilities that will transform the way lawyers work, we believe that mastering the fundamentals of legal research is still essential for law students to become successful legal professionals. Our training program for law students will continue to emphasize traditional legal research skills and principles, including primary and secondary sources, keyword and Boolean searching, legal citation and noting up. These skills will continue to be taught in "Lexis+ Canada Basics" sessions being offered to all Canadian law students.

Supplemental Lexis+ AI training sessions will be offered to first year law students who have completed their Lexis+ Canada Basics sessions, and to upper year law students. This AI session will inform students on extractive versus generative AI, FAQs on confidentiality, hallucinations and citation, prompting best practices, and recommended use cases. Our goal is to empower students with the ability to seamlessly integrate AI-powered tools into their research workflows, while understanding the correct and responsible use of AI.

Student sessions will be available in September 2024 and can be booked through a LexisNexis training representative by emailing your existing training contact or <u>training@lexisnexis.ca</u>.



## Lexis+ AI Overview and Frequently Asked Questions

Lexis+ AI is a generative AI-powered legal assistant, grounded in our extensive repository of accurate and exclusive Canadian legal content. Lexis+ AI combines the power of generative AI with proprietary LexisNexis search technology that seamlessly navigates both English and French legal content to deliver results are that always backed by verifiable, citable authority.

As an efficient starting point for legal research, Lexis+ AI offers four key features:

### 1. Ask a Legal Question (Multi-Turn Conversation/Conversational Search)

- Allows customers to interact with Lexis+ AI like they would with a trusted colleague who intelligently and conversationally responds to their requests.
- Simplifies the complex and time-consuming legal research journey, providing a search experience for diverse legal questions with citations, facilitating lawyers' ability to complete research effectively and efficiently.

### 2. Generate a Draft (Document Drafting)

- Guides customers throughout the legal drafting process, generating a first draft of a legal document, and allowing users to change the language and tone from a simple prompt.
- Generates client emails, letters, legal memos, arguments and contract clauses with remarkable speed and ease.

### 3. Summarize a Case

- Provides a custom summary of any case law document to speed up and guide insightful analysis on a case.
- Offers accurate & complete legal summaries in seconds without clicking into a single search result.

## 4. Upload a Document to Summarize or Ask a Question

- Upload your existing document(s) to summarize, compare and/or semantically search through Lexis+ AI.
- Allows customers to find facts related to a given legal issue, find cases and statutes that have been mentioned in the documents and interpret terms of art.

Will Canadian law schools still have access to the LexisNexis research tools available in prior academic years?

Yes! Canadian law school faculty and students will continue to have access to the Lexis+ Canada platform including Practical Guidance, Legislative Pulse and Legal News Hub (powered by Law360<sup>®</sup> Canada). Alongside these more established tools, Lexis+ AI will be an additional, efficient starting point for legal research. Our training program for law students will continue to emphasize traditional legal research skills and principles, including primary and secondary sources, keyword and Boolean searching, legal citation and noting up.

How is the research process in Lexis+ AI different from traditional searches, like natural language and Boolean searching?

Lexis+ AI leverages generative AI to assist in the completion of a research or drafting task. It analyzes and understands natural language input and can generate appropriate responses based on LexisNexis data. This experience allows for a dynamic, conversational, and iterative research process. To answer a legal question or use



the drafting capabilities on Lexis+ AI, users should treat the interaction much like having a conversation with a colleague. Rather than starting the query in a particular data set, you can simply ask the legal question and conversationally interact with the tool to refine the response with follow up questions. Finally, use more traditional research skills to verify the results provided and expand your research as needed.

Is there a methodology I should follow when interacting with Lexis+ AI to ensure quality results?

Yes, see the section below on Effective Prompting.

How is Lexis+ AI different from ChatGPT?

ChatGPT is not suited for legal research as it does not meet the high standards of accuracy and completeness required for this work. More specifically:

- Lexis+ AI is grounded in our extensive repository of accurate and exclusive Canadian legal content and use cases, which is something that Chat GPT does not have access to.
- ChatGPT doesn't employ techniques like Retrieval Augmented Generation (RAG) to ground its output in truth.
- Lexis+ AI provides direct links to underlying citable authority in its responses. This allows users to instantly validate results, reducing the risk of invented content, or hallucinations. Lexis+ AI automatically checks all linked citations against LexisNexis' content to ensure they are valid.

#### How do I access Lexis+ AI?

Your Lexis+ AI assistant will be available upon login as your default setting in the Experience Dock.

		n Lexis+ 🛯	English Franc	çais			Client: -None-	olders H	istory Help	€ • *	:
AI Assistant	+	+ Create New Cor			<ul> <li>AI Assistant</li> <li>Which legal</li> </ul>	l task can Al a	accelerate fo	or you t	today?		
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Practical Guidance		[2013] O.E.R.T.D. No Summarize uploaded									
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Legislative Pulse		My client is a comme	ercialJut 31								
		My client is a comme	ercialJul 31								
Brief Analysis		My client is a comme									
		My client is a comme	ercialJul 31								
Legal News Hub		Past 7 Days									



When using Lexis+ Canada for legal research you can click on the AI Assistant icon in the left panel to access Lexis+ AI and toggle between the two solutions.

		C Lexis+ Al English Français		Client: -None- Folders His	tory Help C 💽 🛞 🗄 💽 Al			
Al Assistant	+	What would you like to research today?						
Legal Research		Enter terms, sources, a citation, or cit: to no	Enter terms, sources, a citation, or cit: to note up with QuickCITE®					
*					Advanced Search			
Practical Guidance								
~		💛 🍓 Explore Content 🛛 CAN 👌	Content Type Practice Area	Jurisdiction Advanced Search Sources To	pics			
Legislative Pulse		Cases	Current C Historical Laridation	Cocondana Materiale	Docular Courses			
~		Court Decisions	Current & Historical Legislation	Secondary Materials	Popular Sources			
Brief Analysis			Legislation	Commentary & Textbooks	Halsbury's Laws of Canada			
		Tribunal Decisions	Acts	Quantums	JurisClasseur Québec			
Legal		Case Summaries	Annotated Legislation	Drafting Materials (Precedents)	Tables of Concordance			
News Hub		Pleadings, Motions and Facta	Regulations	Law Reviews & Journals	Smart Charts			

Additional product questions?

More FAQs about Lexis+ AI are answered <u>HERE</u>.



## **Effective Prompting**

Effective prompting is a crucial skill when working with AI-powered legal research tools like Lexis+ AI. The quality and specificity of the prompts you provide can significantly impact the accuracy and relevance of the generated results. We recommend that you include the "5Ps" listed below in your prompts to get the best outcome. **The 5Ps are: Prime, Persona, Prompt, Product, and Polish**.

Prompting	The 5-Ingredient Prompting Sandwich Prepare and Refine your Prompt: add 2 steps before and 2 steps after			
Best	PREPARE		EXAMPLES	
Practices:		– context, background sdiction, parties, ts	"Under the law of Alberta" "Our client is a clothing retailer incorporated in Ontario"	
Lexis+ Al <sup>™</sup>	PERSO perspec	NA – personality, tone & ctive	" from the perspective of the purchaser" "to the legal counsel for"	
	PROMPT			
What is a prompt?		PT – clear and specific of actions, use verbs or estion	"Draft a cease and desist letter to " "Summarize the decision in" "Compare"	
An instruction.	REFINE			
A request. A conversation.	1. J. Martin Contraction of the second se	UCT – type and specs of put e.g. format, length	" less than 500 words" "as a ten-point checklist"	
	verify t	H – elaborate, refine, hrough conversation, e examples	"Make the letter more aggressive" "Shorten and simplify" "Expand on the issue of"	

Here are some examples of weak and strong prompts, using the 5Ps:

Weak Prompt	Strong Prompt
Draft a software licensing agreement.	Our client is a technology startup incorporated and located in Ontario. As legal counsel to the corporation, draft a software licensing agreement with the corporation as licensor, covering intellectual property rights, maintenance and support, training and permitted uses. Maximum length 3 pages.
Write a letter to a lawyer to stop payments being made to our client's relatives.	My client has been living outside of Canada for the last 10 years. He recently discovered that his father passed away 2 years ago in Calgary without a will. After placing an ad in the paper and making inquiries, the lawyer for the estate has begun taking steps to distribute the estate to the only other known living relative, his father's uncle. As counsel to our client, draft a letter from me to the lawyer for the estate requesting that he immediately stop all payments to the uncle. Letter will be dated June 5 and be delivered by email. End with "Govern yourselves accordingly."



### Lexis+ AI Classroom Integration

As with databases and other, more traditional research tools, Lexis+ AI should be considered as a starting point for legal research. Students will still be required to review, analyze, verify, and expand their research as necessary. Here are some suggested classroom exercises to help prepare students for working with Lexis+ AI.

### **Classroom Exercises**

- **Deciding Which Legal Tool to Use:** The purpose of this exercise is to familiarize students with the distinctions between extractive (e.g. search engines) and generative AI (e.g. Lexis+ AI), to help them choose the most suitable tool for researching a given legal issue, and to help them recognize that the choice of tool is usually variable (depending on the tools available to them, their personal preferences, and the nature of their research/legal task).
  - Provide students with 5 legal issues then task students to consider the nature of those legal issues and make an initial decision on whether an extractive or generative tool might be more suitable.
  - Provide students with 5 legal issues to research and/or 5 legal drafting tasks. Next, ask students to
    identify and discuss whether extractive AI tools (in Lexis+, for example), publicly available generative AI
    tools (ChatGPT, Claude, etc.), and/or generative AI built specifically for legal research (Lexis+ AI) would
    be the more effective tool to start with and why.
- **Prompt Design Competitions:** Provide students with a specific legal issue or drafting task, have students design prompts to obtain effective responses from Lexis+ AI. Run the prompts and compare the outputs. Discuss which prompts were most effective and why.
  - Example: Create a prompt to research whether planting tomatoes in a public park is considered illegal.
  - Example: Draft a letter to opposing counsel to ask that their client meet their obligations under a contract (i.e., to deliver goods on time, to perform a particular task, etc.).
  - Note: These examples intentionally do not use specific legal terms (e.g., using the term "demand letter") to allow students to explore different prompt terms and to assess output.
- **Platform Output Comparisons:** Divide students into groups. Assign each group a platform on which to run various searches/prompts (e.g., Lexis+, Lexis+ AI, Google, ChatGPT, etc.). Provide sample searches (Consult the LexisNexis Guide to Effective Prompting for prompt ideas) and facilitate class discussion comparing and contrasting the different results.
- Edit & Revise Output: Ask Lexis+ AI to draft a legal document. Provide the draft generated to students to critically assess and revise to either change the tone, change the viewpoint of the letter writer, and/or to change the jurisdiction.
  - Example: Draft a letter to a school challenging discipline imposed on a student for refusing to wear the school uniform.
  - Example: Draft a memo summarizing the requirements for adverse possession.
  - Note: Neither the jurisdiction nor the viewpoint/role of the writer is identified in these prompts. Either
    provide the jurisdiction and viewpoint/role of the letter writer or allow students to edit and make those
    decisions for themselves. Once students have had an opportunity to edit and revise the drafts, discuss
    the factors driving the editing decisions as well as best practices for using forms and templates
    (including those generated by AI) in legal practice
- **Research & Write Counterarguments:** Ask Lexis+ Al to draft opposing arguments for two sides of a legal position and compare the outputs. This exercise can be customized to the subject matter of the course.
  - Example: Ask Lexis+ AI to identify grounds for eviction of a tenant in [JURISDICTION]. Next, ask Lexis+ AI to identify grounds to oppose eviction and to draft an argument to that effect.
  - Note: Use these or other class-specific examples to have students generate arguments and counterarguments. Facilitate student presentation of their output and discussion about differing outputs when prompts provide the answer to a legal question. Provide guidance to students that all



output needs to be evaluated, and source materials need to be read and analyzed to make determinations about the strength of a particular legal argument/position.

## Additional Lexis+ AI Resources

- Your LexisNexis Product Adoption Training Consultant is one of the most helpful resources available for teaching and instructional support. They can create customized training and research instruction for you and your students. You can also email training@lexisnexis.ca to connect with a LexisNexis Product Adoption Consultant.
- Lexis+ AI Law School Faculty Resources page
- Lexis+ AI Training Resources and Documentation
- LexisNexis Guide to Effective Prompting
- Frequently Asked Questions
- Lexis+ AI Training Videos
  - o How to Draft a Legal Memo in Lexis+ Al
  - o How to Draft an Email in Lexis+ Al
  - o How to Ask a Legal Question in Lexis+ Al
  - o How to Summarize a Case in Lexis+ Al
  - o How to Summarize a Document in Lexis+ Al
  - o <u>5P Methodology Prompting Fundamentals</u>