

LRC Research Training

Clinics Generative AI Update Summer 2026

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Today We'll Cover:

- Refresher on using gen AI in practice
- Google Gemini
- Lexis Protégé
- Westlaw AI tools
- Harvey
- vLex

Pop Quiz!

How does gen AI work?

Considerations for Using Gen AI in Practice

- Confidentiality
- Employer (Clinic) policies
- Court rules
- Ethical guidance

Confidentiality

- Lawyers have a duty to keep client information confidential.
- Some tools promise greater data protection and confidentiality than others, so make sure to investigate a tool's policies before using it.
 - Lexis and Westlaw claim that academic users receive the same data protections, but this is not backed up by the strong contractual protections firms can negotiate.
 - Generally available tools like ChatGPT offer less protection, so be particularly cautious with them.
- Avoid putting confidential client information into any AI tool.

Employer (Clinic) Policies

- Always follow your employer's (the clinic's) policies on the use of gen AI and other technology.
 - Confidentiality and other legal ethics considerations
 - Client preferences
- When in doubt, ask first!

Court Rules

- Some courts and individual judges have rules or standing orders governing the use of gen AI in creating court filings.
 - Even when the clinic's policy would allow the use of gen AI tools, make sure to check whether the court and/or judge allows the use.
- Lawyers continue to be sanctioned and disciplined for including hallucinated cases in court filings, so be sure to verify all citations.
 - For several examples, see Frank Young, *When AI Hallucinates Courts Hammer Attorneys*, RIPS Law Librarian Blog (Feb. 28, 2025), <https://ripslawlibrarian.wordpress.com/2025/02/28/when-ai-hallucinates-courts-hammer-attorneys/>.

Ethical Guidance

- ABA Comm. on Ethics & Pro. Resp., Formal Op. 512 (2024) (discussing generative artificial intelligence tools).
 - Discusses competence, confidentiality, communication, interactions with the court, supervision, and fees.
- State Bar of California Standing Comm. on Pro. Resp. & Conduct, Practical Guidance for the Use of Generative Artificial Intelligence in the Practice of Law (May 14, 2026).
 - Discusses similar and additional topics as the ABA.

When to Use Gen AI Tools in Legal Research

- There's no single “right time,” but there are many wrong ways.
 - Use a tool appropriate for the task.
 - Critically evaluate all AI-generated content.
 - Follow all relevant laws, rules, and instructions.
 - Always use citator on newly discovered primary law sources.

Gen AI Research Tasks

Find	Learn/Investigate	Create/Synthesize/Summarize
• Find some starting cases on a topic • Find cases matching query	• Learn about an area of law • Identify the most relevant, timely, & authoritative cases • Ensure there is no authority going the other way • Identify the relevant rule(s)	• Ensure you've found all cases on point • Summarize the leading authorities • Prune tangential authorities • Harmonize authorities • Reconcile authorities in conflict

Adapted from Rebecca Fordon, Cindy Guyer & Adam Lederer, From AND/OR to AI: Techniques for Prompting Generative AI Tools (May 21, 2024).

Gen AI Writing Tasks

- Catching typos and grammar errors
 - But not perfect Bluebooking
- Modifying tone
- Brainstorming
- Summarizing specific, discrete pieces of text
- Creating first drafts

Considerations for Effective Prompting

- Prompting is not the same as natural language searching
- Prompts should generally include:
 - What **task** you want the AI to perform
 - What **legal context** and background information is needed to perform the task
 - What **kind of answer** you want
- Each platform takes in this information and processes it differently, look out for best practices!

Evaluating AI-Generated Content

Usage: “Did I use the right tool?”	Input: “Did I use an effective prompt?”	Output: “Did the tool give an acceptable response?”
• Designed purpose of tool • Scope of training and/or RAG • Tool transparency	• Prompt included task, legal context, and kind of answer expected • Influence of follow-up interactions • Missing perspectives from prompts	• Source & accuracy verification • Bias & perspective in response • Interaction dynamic between AI & user • Critical evaluation considering ultimate research objective

Adapted from Mary Ann Naumann, Re-Engineering Research: Integrating Generative AI & Prompt Engineering into Information Literacy Programs (June 30, 2024).

Reviewing an Updated Gen AI Tool

- What hasn't changed about the tool? What's the same?
- What's brand new about the tool? What features have you not seen before?
- What's new but familiar about the tool? What features have you seen in other tools but not this one?
- How does the response or output compare to what the tool used to do?

Assessing New (To You) Gen AI Tools

- Look at any training videos or documentation available and sign up for trainings offered by your employer/the developer.
- Find out what LLMs are being used and what the sources of RAG are.
 - Different LLMs are good at different tasks.
 - Sources of RAG could be primary law, authoritative secondary sources, and/or the open web.
- Explore the tool: what looks familiar from other tools and what looks new to you?
- Run some example prompts on a topic that you know.

Google Gemini

- Google's AI products are USD's preferred set of AI tools.
- Google will not use USD data to train Gemini models.
- Complies with FERPA and GDPR data security standards.
 - These are not generally as strict as standards law firms hold themselves to.

Lexis Protégé

- Protégé Legal AI
 - New user interface but previous functions are still available.
 - New workflows, over 250 in three categories: litigation, transactional, and common.
 - Coming soon: skills (editable multi-step plans for complex work)
 - Library allows saving prompts to be reused in the future.
 - Content type filter allows specifying types of materials.
- Protégé General AI
 - Standard Claude, Gemini, and GPT models can be run in Lexis' secure data environment.
 - Can search Lexis content and the open web; open web searches can use deep research functions.

Westlaw AI Tools Part 1

- Parallel Search

- Not technically AI but uses related neural net technology
- Searches for similar concepts and synonyms related to query
- Currently limited filtering and results

- Claims Explorer

- Identifies potential statutory, common law, and constitutional causes of action based on a set of facts
- Only has federal and some state jurisdictions, including CA
- Scope of Training/RAG: Some primary law and Westlaw “editorial content”
 - Will link to statutes and constitutions that establish claims but does not link to cases that establish common law claims

Westlaw AI Tools Part 2

- AI Deep Research

- Uses reasoning/"agentic" processes to produce detailed and polished reports
 - Variable depth based on selected report type, Concise or Expanded (only Concise reports are available in student accounts)
- RAG with cases, statutes, regulations, Practical Law content, and some secondary sources
- Enhance feature will allow regeneration of report to include more specific and relevant facts

- CoCounsel

- Skills similar to workflows in other tools

Harvey

- Log in with USD email
- Harvey is popular in Big Law and with firm partners
- Uses Open AI, Anthropic, and Google models
- No default knowledge source of cases or statutes but can search the web (Lexis integration not available in academic accounts)
- Includes workflows
 - Like Protégé workflows and Westlaw CoCounsel skills; Harvey workflows also work better with uploaded documents
 - Custom workflow builder allows for more personalized uses

vLex

- vLex is a legal research database providing access to legal resources from over 100 countries. Individual account with USD email required to access all features, including search history, alerts, and Vincent AI.
- Vincent AI
 - Similar look and output to other legal gen AI tools, including workflows
 - Ask a Research Question workflow allows modifying the list of legal authorities used to generate response
 - Compare Jurisdictions workflow great for comparing laws and regulations across many jurisdictions (US states and federal AND foreign jurisdictions)

Final Gen AI Reminders

- Follow all policies and rules on when and how you can use gen AI.
- When required, disclose what tool you used and what you used it for.
- Ask ahead of time if you're not sure whether you should or should not use a tool.
- [LRC Guide to Generative AI Tools for USD Law Students](#)

LRC Reference

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619.260.4612

Chat: sandiego.edu/law/library

Book an appointment: law-sandiego.libcal.com/appointments

In-person

Monday: 9am – 6pm

Tuesday – Friday: 9am – 5pm

Reference hours at the clinics: bit.ly/LRC-Clinics

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