

Generative AI: Using Lexis Protégé

Legal Research Center Video Series

Using Lexis Protégé

Today's topics:

1. Identifying features of Lexis Protégé.
2. Comparing an AI-generated response to a traditional secondary source.

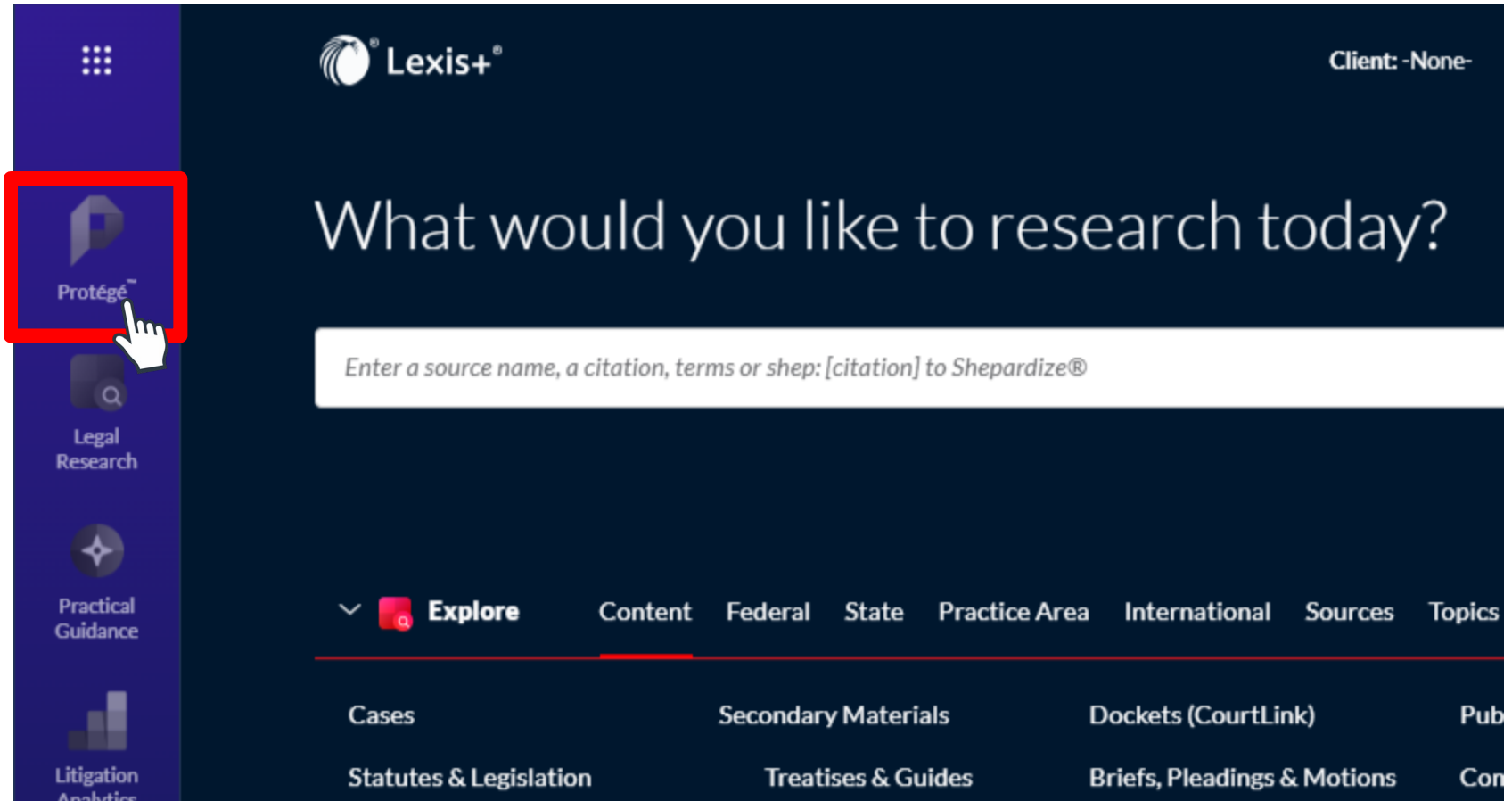
Basic Information about Protégé

- Designed for research, drafting, and other legal tasks
- LLMs available: select from **OpenAI** (ChatGPT), **Anthropic** (Claude), or **Google Gemini** models or use default “**Best Fit**” to use what Lexis thinks is best
- Strong promises of data protection and security

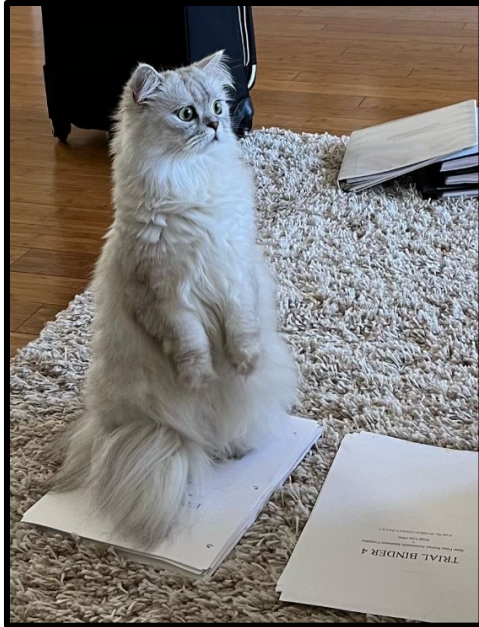
Sources of Retrieval Augmented Generation

- Protégé can search for sources in the following categories and use them in creating responses:
 - Case law
 - Codes, rules, and constitution (statutes)
 - Administrative codes (regulations)
 - Agency decisions
 - Practical Guidance (specialized type of secondary source)
 - Treatises
 - Protégé will only use treatises published by Lexis
 - Protégé will NOT use other common types of secondary sources or those published by Westlaw (e.g. CalJur, AmJur, and ALR)

Lexis Protégé Walkthrough



Example: Cattitude!



Cattitude: an upscale cat-walking service in La Jolla, CA

A couple years ago Sam signed up to be a full-time cat-walker and was thrilled at this niche opportunity.

Cattitude assigns cat clients and a company vehicle to Sam and now Sam's only income comes from cat-walking. Sam has never walked cats for any other company and has never advertised other walking services on their own.

Sam knows that some dog walkers like those on Rover! are considered independent contractors and Sam wants to know what they should be classified as under California employment law.

Traditional Secondary Sources

The screenshot displays the Lexis+ search results page for the query "Independent contractor employee". The interface includes a top navigation bar with options like "Run New Search", "Client: -None-", "Folders", "History", "Help", and "Hybrid". A red box highlights the search results header, which includes the text "Results for: Independent contractor employee" and a "Natural Language" dropdown. On the left sidebar, a red box highlights the "Secondary Materials" section, which lists various legal resources with their counts: Cases (10,000+), Statutes and Legislation (10,000+), Practical Guidance (2,719), Secondary Materials (344), Treatises & Guides (1,650), Law Reviews and Journals (1,353), Jurisprudence (344), Practice Insights (13), Legal Topic Summaries (4), Administrative Materials (10,000+), and a "More" link. Below this, there are sections for "Search Within Results" and "Jurisdiction" (set to 1). The main content area shows three search results, each with a "View Table of Contents" link. A hand cursor is pointing at the second result, "29 Ca Jur Employer and Employee § 11".

Results for: Independent contractor employee Natural Language

Cases 10,000+
Statutes and Legislation 10,000+
Practical Guidance 2,719
Secondary Materials 344
Treatises & Guides 1,650
Law Reviews and Journals 1,353
Jurisprudence 344
Practice Insights 13
Legal Topic Summaries 4
Administrative Materials 10,000+
More

Search Within Results
Jurisdiction 1

Practice Areas & Topics

Jurisprudence California Clear

Sort by: Relevance

1 38 Ca Jur Independent Contractors § 29
California Jurisprudence 3d | 38 Ca Jur Independent Contractors § 29 | Mary Ellen West, J.D.
§ 29 Condition of work premises affecting employer's liability to independent contractor's employees
View Table of Contents

2 29 Ca Jur Employer and Employee § 11
California Jurisprudence 3d | 29 Ca Jur Employer and Employee § 11 | Janice Holben, J.D.; and Karl Oakes, J.D.
§ 11 Employee distinguished from independent contractor
View Table of Contents

3 38 Ca Jur Independent Contractors § 14
California Jurisprudence 3d | 38 Ca Jur Independent Contractors § 14 | Mary Ellen West, J.D.
§ 14 Determination of employer-employee or independent contractor relationship as question of fact or law; review

Considerations for Effective Prompting

- Prompts should generally include:
 - What **task** you want the AI to perform
 - Locate sources about independent contractor vs. employee
 - What **legal context** and background information is needed to perform the task
 - Jurisdiction: California
 - Key facts: Sam works full time, Sam has never advertised their own services, etc.
 - What **kind of answer** you want
 - No particular kind of answer needed
- Protégé is designed for lawyer and can infer some common tasks and kinds of answers.

Lexis Protégé Demo

The screenshot displays the Lexis Protégé web interface. On the left is a sidebar with the Protégé logo and navigation options: 'New conversation', 'Search conversations', 'WORK' (with sub-items 'Skills' and 'Workflows'), 'VAULTS' (with 'New Vault' and 'EEOC v. Papa John's'), and 'CONVERSATIONS'. The main area shows a search result for 'Best Fit' with the client set to '-None-'. The search query is 'How can I accelerate your work today?'. The result text reads: 'Under California employment law, is a worker properly classified as an employee or independent contractor when they work full-time, have assignments given by the hiring company, use a company-provided vehicle, have never worked for any other company in the industry, and have never advertised independent services?'. Below the text are interactive elements: a '+ Case law +8' button, an 'Improve prompt' button with a star icon, a 'Library' button with a book icon, a microphone icon, and an upward arrow icon in a circle.

Protégé™

Best Fit

Client: -None-

New conversation

Search conversations

WORK

Skills

Workflows

VAULTS

New Vault

EEOC v. Papa John's

CONVERSATIONS

How can I accelerate your work today?

Under California employment law, is a worker properly classified as an employee or independent contractor when they work full-time, have assignments given by the hiring company, use a company-provided vehicle, have never worked for any other company in the industry, and have never advertised independent services?

+ Case law +8

Improve prompt

Library

↑

Wrap Up

- Protégé has access to several LLMs and can search cases, statutes, and some secondary sources.
- Responses generated by Protégé might not rely on the exact same cases and statutes as traditional secondary sources.
- Responses generated by Protégé may be more direct than traditional secondary sources so you need to make sure to not let it substitute your own judgment.

LRC Reference Desk

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Chat: sandiego.edu/law/library

Other videos in this series are available on [the LWR Research Trainings page](#) of the LRC's website.