

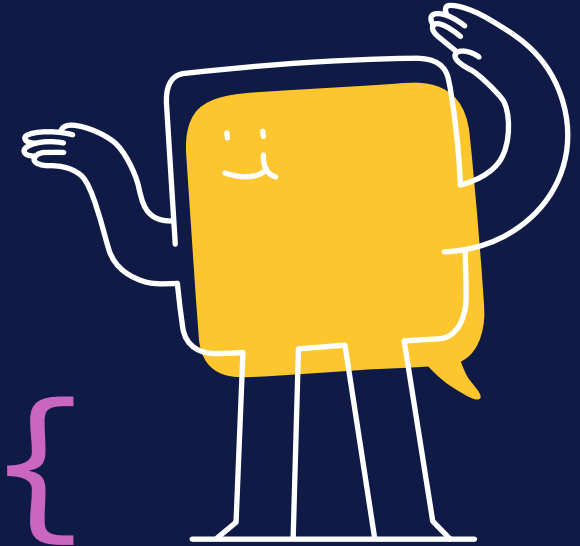


ADSS Cymru

Yn arwain Gwasanaethau
Cymdeithasol yng Nghymru

Leading Social Services in Wales

// how to use
=> copilot {
prompts } ...



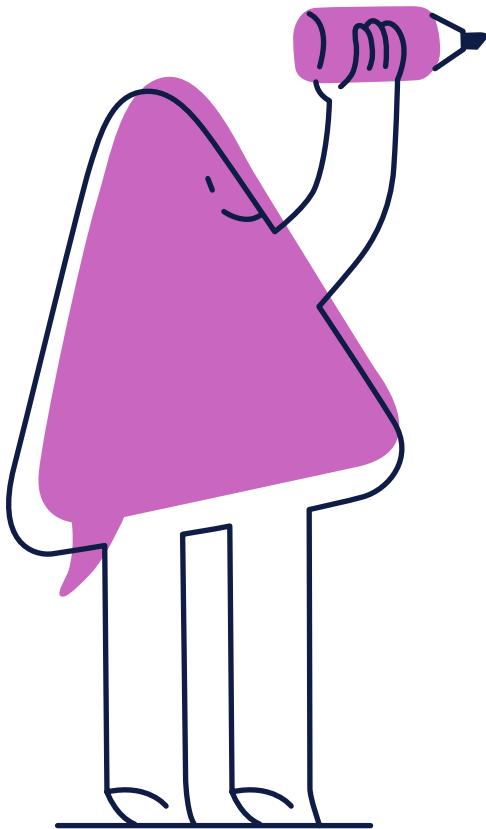
> a training toolkit
for social work teams

Introduction to the toolkit

Welcome to the training toolkit for social work teams within Local Authorities in Wales.

This toolkit is designed to empower social work professionals by providing them with the knowledge and tools needed to effectively use Microsoft Copilot prompts in their day-to-day work. It was created in response to the findings in the [Assessing the digital and workforce readiness of local authorities to implement Copilot in Adult Social Care in Wales](#) report.

The toolkit includes a comprehensive description of what a Copilot prompt is, a series of bitesize videos and guides, and top tips for creating your own prompts. By leveraging the power of Microsoft Copilot, social work teams can streamline their workflows, enhance collaboration, and improve overall efficiency.



This publication has been created by WLGA and ADSS Cymru, in partnership with Stable and Practice Solutions.

How to use this toolkit

This toolkit is structured to provide you with a step-by-step guide on how to effectively use Microsoft Copilot prompts. Here's how you can make the most out of it:

1. **Understanding Copilot Prompts**: Start by familiarising yourself with what Copilot prompts are and how they work. This section includes detailed explanations and examples to help you understand the basics.
2. **Bitesize Videos and Guides**: Watch the Bitesize videos and follow the guides provided. These resources are designed to give you practical insights and hands-on experience with using Copilot prompts in various scenarios.
3. **Top Tips for Creating Prompts**: Learn the best practices for creating effective Copilot prompts. This section includes valuable tips and techniques to help you write clear and specific prompts that yield accurate and relevant responses.
4. **Practice and Apply**: Use the example prompts and practice creating your own. The more you practice, the more proficient you will become in using Copilot prompts to enhance your work.
5. **Collaborate and Share**: Share your prompts and experiences with your team. Collaboration is key to maximizing the benefits of using Copilot prompts. By sharing your knowledge and learning from others, you can continuously improve and innovate.

We hope this toolkit will be a valuable resource for you and your team.

Happy learning and collaborating!



Understanding Copilot prompts

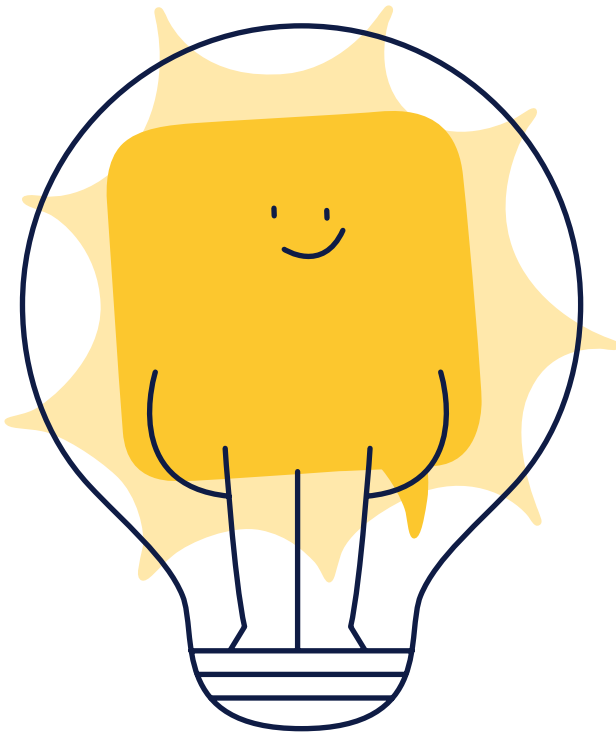
Prompts are the instructions or queries written by users to tell a generative AI assistant, like Microsoft Copilot, what response they would like. These prompts can range from simple questions to detailed requests for information.

How well Microsoft Copilot responds largely depends on the clarity and specificity of these prompts, as they help it understand the user's intent and deliver accurate and relevant answers. By structuring prompts thoughtfully, users can ensure that Copilot focuses on the most important parts of their question, leading to better results.

The benefits of well-crafted prompts extend across practitioners, teams, and organisations:

- For practitioners, clear prompts can streamline workflows and enhance productivity by providing precise answers and solutions.
- Teams can use structured prompts to facilitate better collaboration, ensuring that everyone is on the same page and working towards common goals.
- Organisations can share prompts to improve communication, decision-making, and overall efficiency.

Structuring prompts effectively is essential to maximise these benefits.

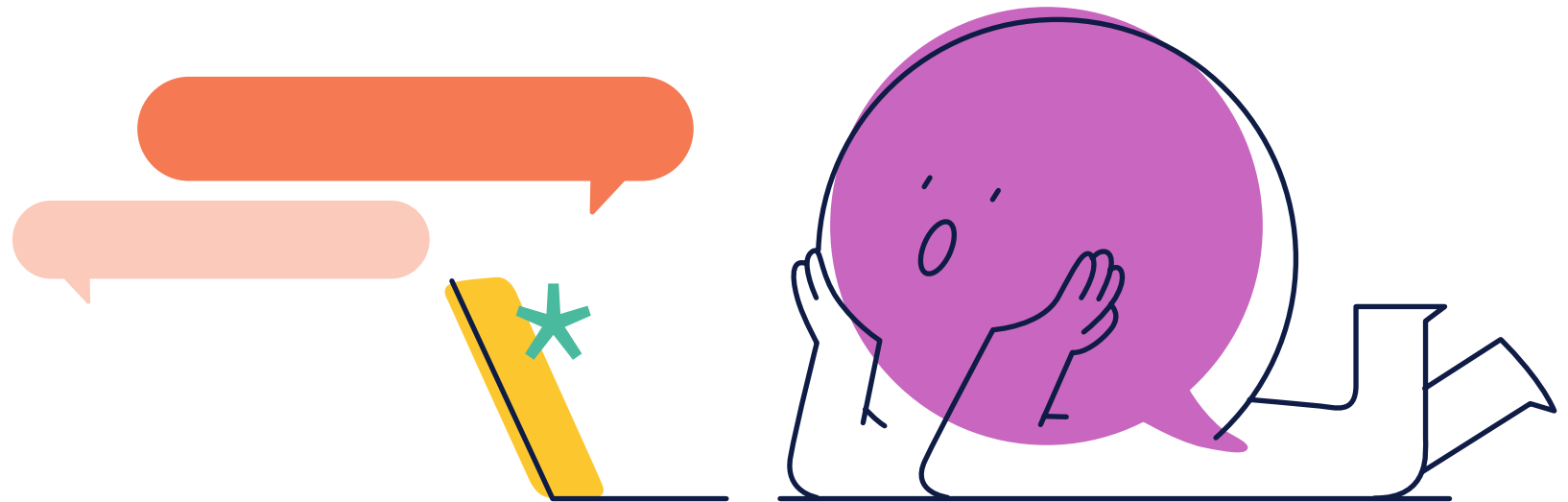


Bitesize videos and guides

This section includes a number of prompts structured in the correct way to support the tasks carried out by people working in Social Services.

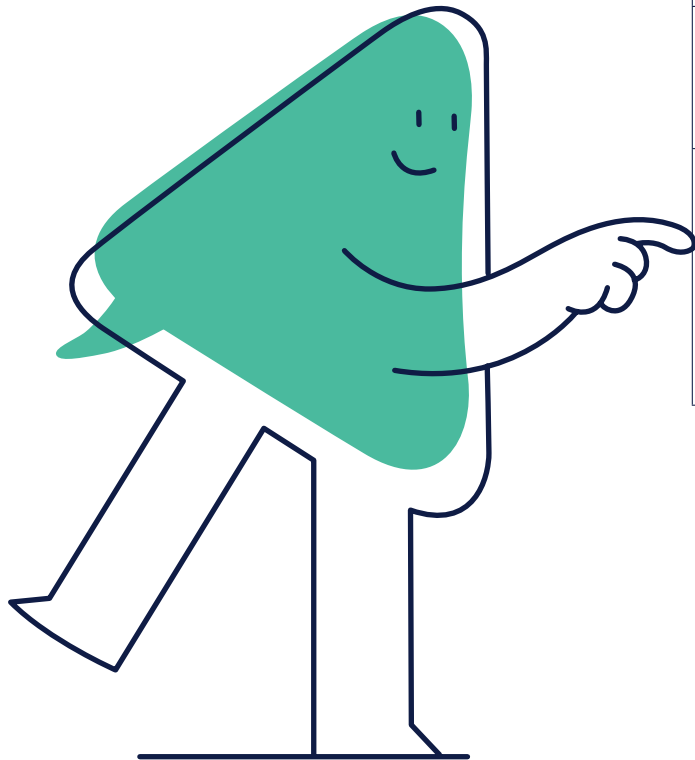
NOTES: In some of the example prompts below, there are words between brackets '< >', such as <file name> or <contact name>. The words in brackets are placeholders and need to be replaced by the prompt writer with a relevant word or name. For example, '<contact name>' could be replaced by 'Mr. Jones'.

All examples used in video guides are using fictitious names and do not reflect real life scenarios (case studies were created for demonstration purposes).



task

Email Summary



Role	First Point of Contact
Copilot	Microsoft Outlook
Situation	People often need to read a summary of long emails, want to ask questions about how to respond, and search their mailbox for relevant messages.
Benefit	People can save time and make faster decisions with Copilot's help in summarising and responding to questions. Copilot can also easily bring many messages together on the same topic.
Prompt	Create a summary of emails and messages that mention the individual seeking care and support <contact name>. I want to see all the messages I've been sent about her to help her access the social care services my team provides. Focus on emails in my Outlook mailbox and messages from Microsoft Teams since June this year. Use simple language but with a professional tone.

video guide

[1 Email Summary](#)

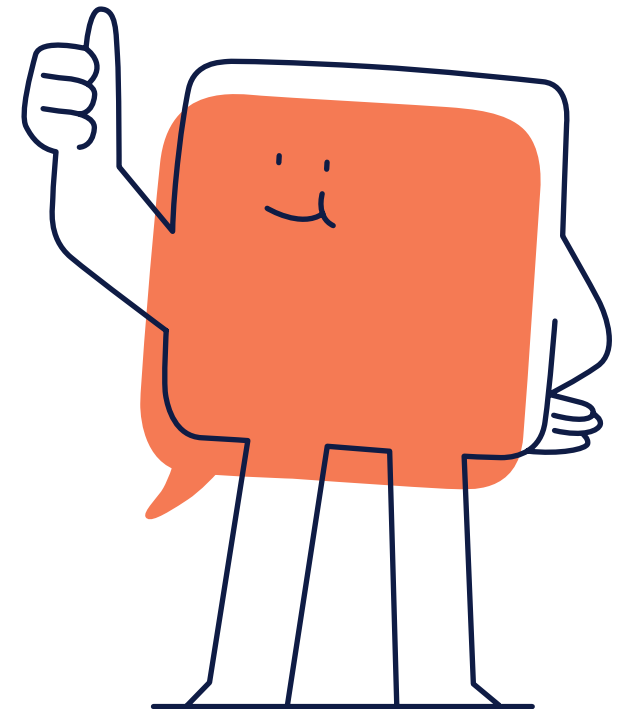
task

Public Protection Notice Summary

Role	First Point of Contact
Copilot	Chat
Situation	Public Protection Notices (PPNs) can occasionally be grammatically ambiguous and unclear. Copilot can provide summaries of the text for improved comprehension. Additionally, users can ask Copilot to present the summary in chronological order and get advice on the next steps.
Benefit	Copilot saves the user time by listing unstructured information chronologically and suggests next steps to speed up decision making.
Prompt	Create a bulleted list that allows me to summarise a series of incidents documented in a Public Protection Notice (PPN). Use this Microsoft Word document <filename> which has the PPN content and is an unstructured account of each incident. Add the dates of each incident and list them chronologically. Add one recommendation for each incident suggesting what my team should do to support the people involved.

video guide

[2. Public Protection Notice](#)



task

Preparing Notes



Role	Carrying out Statutory Assessments
Copilot	Chat
Situation	In this situation Copilot is used to summarise a list of notes. The notes may be taken during a conversation or home visit with an individual seeking care and support, and the user wants to create a more formal summary from the notes.
Benefit	Copilot saves the interviewer time, because notes can be written down in a haphazard way, like a stream of consciousness, without much thought for grammar or punctuation. Copilot can take that text and turn it into a summary that can be used to prepare case notes.
Prompt	Create a four-paragraph summary I can use for writing a care and support assessment for the individual seeking care and support. Use this file <filename> which is a list of notes I made after my last interview with the individual seeking care and support. Use simple language but with a professional tone of voice, that I can use for an official care assessment.

video guide

[3 Preparing Notes](#)

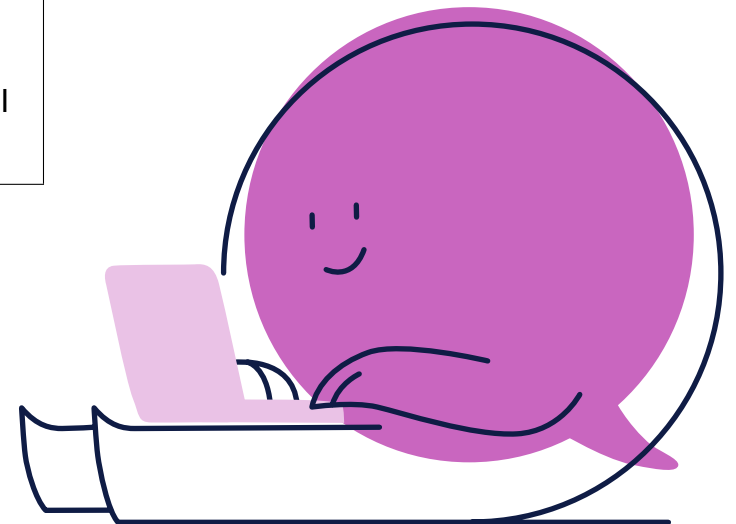
task

Gauging Sentiment

Role	Carrying out Statutory Assessments
Copilot	Chat
Situation	In this scenario we use Copilot to understand how the participants of a recorded conversation are feeling, based on what they say. The transcript of the conversation is used to summarise the sentiment of the individual seeking care and support.
Benefit	This allows the social care worker to quickly assess how the beneficiary was feeling during the call and understand in more detail how they can support the individual seeking care and support.
Prompt	Create a summary of how the individual seeking care and support is feeling during an interview they attended. Use this file which is a transcript of the conversation with the individual seeking care and support. Use simple language with a professional tone of voice that I can use for an official care and support assessment.

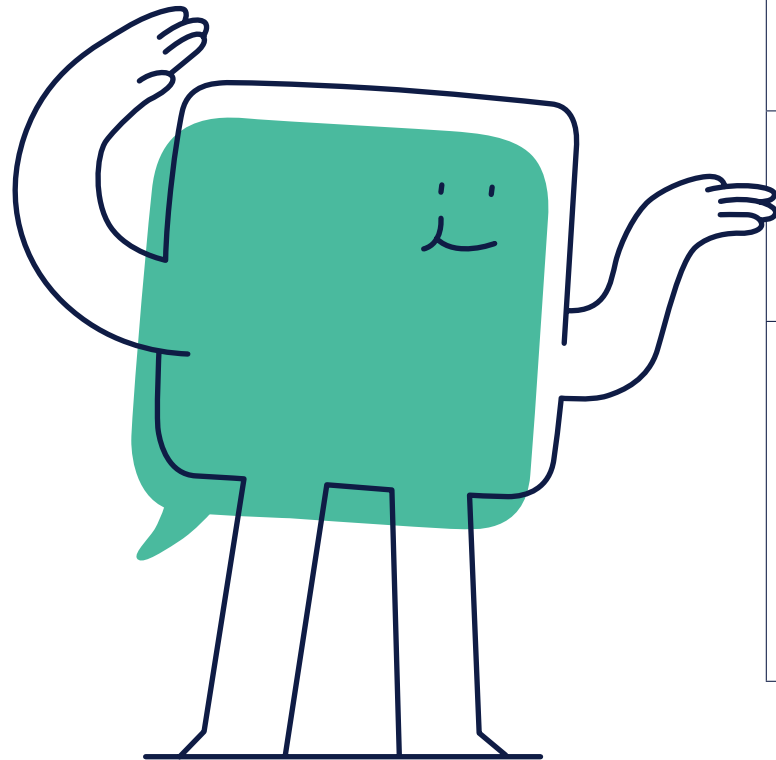
video guide

[4 Gauging Sentiment](#)



task

Preparing a Care Assessment



Role	Carrying out a Care Assessment
Copilot	Chat
Situation	In this scenario the social care worker is tasked with producing a care and support assessment for a beneficiary. The assessment needs to draw information from several different sources, including notes made in Microsoft Word, emails and messages sent regarding the individual seeking care and support, and bring them together in one place.
Benefit	Pulling relevant information from multiple sources to support the development of a care and support assessment is time consuming and relies heavily on the memory and discretion of a busy human. Copilot can do much of the leg work to find and collate information from different sources and summarise and present it to the writer.
Prompt	Draft a report using the notes from series of conversations I've had with an individual seeking care and support <contact name> that I can use to prepare content for a care and support assessment. Use these notes from the conversations <file names>. Include any recommendations for <contact name> future care. Add details about their concerns. Summarise the key points from both visits. Use simple language with a professional tone of voice. Present the information in chronological order, using descriptive paragraphs, not bullet points.

video guide

[5 Preparing a Care Assessment](#)

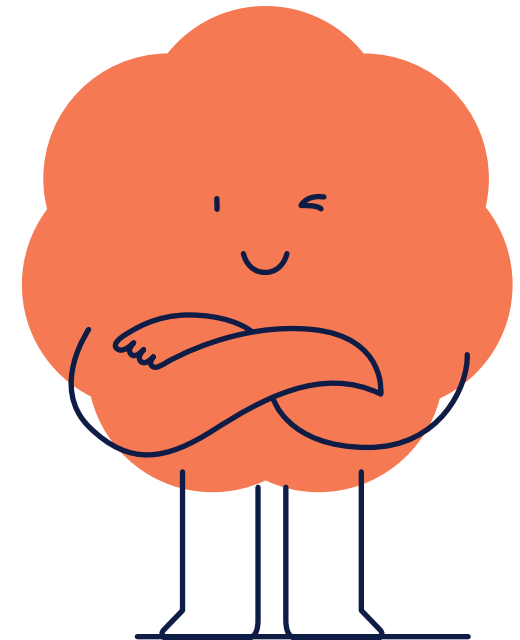
task

Redacting Personal Identifiable Information

Role	Carrying out Statutory Assessments
Copilot	Microsoft Word
Situation	Personally Identifiable information (PII) is content found in files and messages that may be considered sensitive by the subject. That could be a name, address or telephone number of a person. In many cases it is not appropriate to share PII in content when sharing it with other teams or external partners.
Benefit	In this example Copilot is used in Microsoft Word to find the PII, including names, addresses and contact details, in a Word file. The PII is then removed from view by replacing the content with a tag labelled 'Redacted'. This saves the user time because they no longer have to find each piece of PII and manually redact it.
Prompt	Redact all the Personally Identifiable information (PII) from this file, so it can be shared with people who do not need to see the sensitive information.

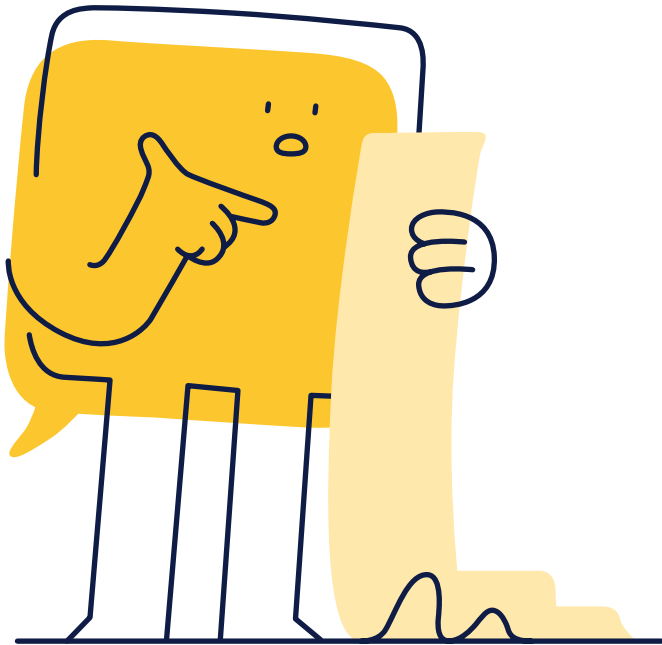
video guide

[6 Redacting Personal Identifiable Information](#)



task

Summarising Transcripts



Role	Carrying out Statutory Assessments
Copilot	Chat
Situation	A transcript records everything said in a meeting, including who spoke and when. It can be created from a Microsoft Teams call or an audio recording device. The transcript can be saved as a Microsoft Word file and used by Copilot to summarise notes from individual seeking care and support conversations. Previous notes can be referenced to track changes in the individual seeking care and support's situation.
Benefit	Transcripts can be long, so using Copilot to summarise the information is an efficient way to save time for the social care worker. It also allows them to concentrate on the individual seeking care and support without the need to take notes during the conversation. For users conducting many conversations each week that require notetaking, Copilot can shorten the process of documenting them.
Prompt	Create four paragraphs I can use to add to a care and support assessment for an individual seeking care and support called <client name>. Use the latest transcript saved as a Microsoft Word file <file name>, and include these <file name>, which are other conversation I've had in the past. For each paragraph include areas of concern that I should be aware of and make recommendations on what the next steps should be to help the individual seeking care and support. Use simple language with a professional tone of voice.

video guide

[7 Summarising Transcripts](#)

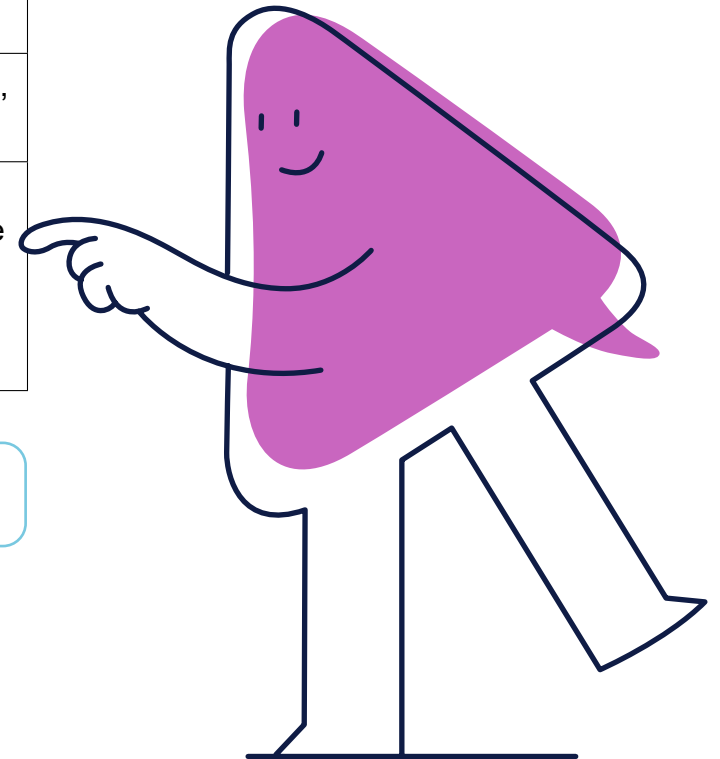
task

Preparing for Meetings

Role	All
Copilot	Microsoft Outlook
Situation	Social care workers have many meetings to attend, both in person and online. In this setting preparing for meetings and switching context to a new situation or the individual seeking care and support can be challenging.
Benefit	Copilot in Microsoft Outlook helps users prepare quickly for meetings, saving time and improving effectiveness.
Prompt	Give me a list of four talking points to help me prepare for my next meeting <meeting name>. Incorporate any emails and messages I've had relevant to this meeting. Show me background to the talk points and prioritise them so I understand what's important. Show them in simple language.

video guide

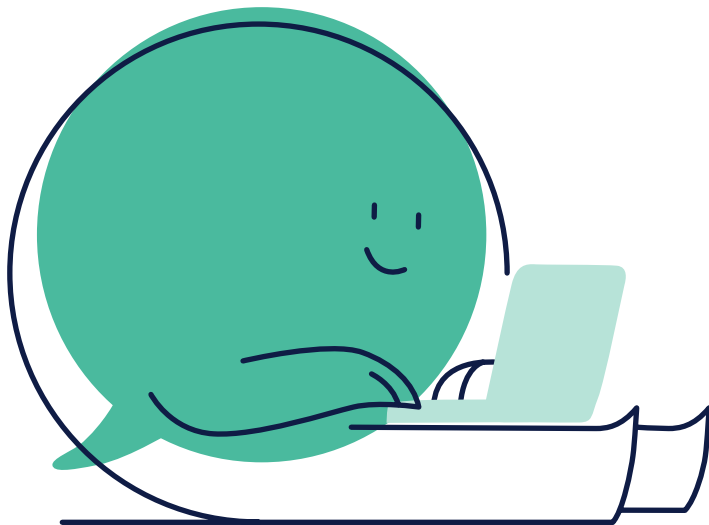
[8 Preparing for Meetings](#)



task

Improving Email Communications

Role	All
Copilot	Microsoft Outlook
Situation	In certain situations, it can be challenging to write coherently and professionally about the subject matter. Copilot assists users in composing emails by applying a specific tone or structure to the messages, so helping the writer sound more engaging, casual, or professional as needed.
Benefit	Using Copilot to compose emails with a specific tone or structure offers the benefit of enhancing clarity and professionalism, saving time, maintaining consistency, improving engagement, and reducing stress. This helps Copilots users create messages effectively.
Prompt	Draft an email and ask for request information from <name> about care and support assessments. I need information on the procedures, key considerations, and any best practices you recommend when conducting care and support assessments. Draft an email in a polite, formal and professional tone. Use my name as a signature, and <name> as the recipient.



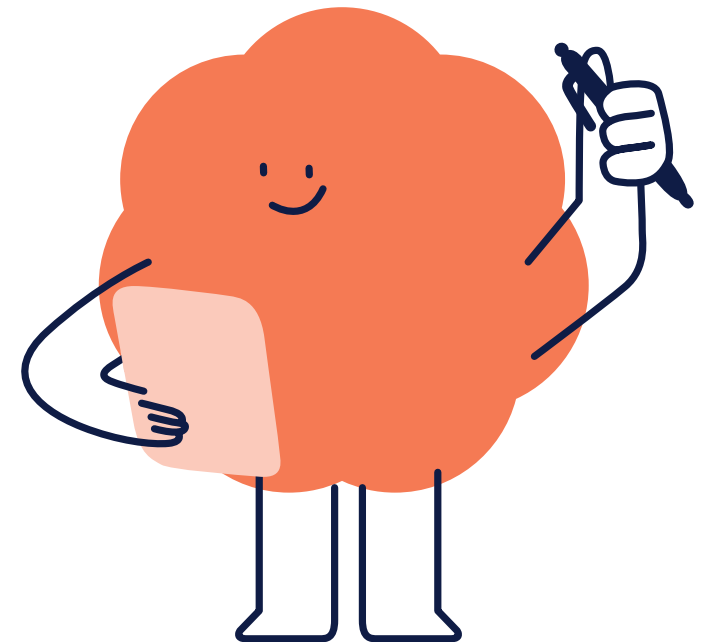
video guide

[9 Improving Email Communications](#)

task

Referencing Best Practices

Role	Carrying out Statutory Assessments Reviewing of Statutory Assessments
Copilot	Chat, Microsoft Word
Situation	In this scenario the social care worker is writing/drafting a care and support assessment in Microsoft Word. Copilot is used to review the assessment. A second file, which is a list of report writing best practices is also referenced. Copilot is asked to compare the two files and make recommendations on what changes could be made to make the original file follow to the best practices.
Benefit	Using a file with best practices helps the assessment writing process in several ways. It can act as an educational tool because the best practice guide will show assessment writers what a good report should look like. It also allows more seasoned employees to update their skills as best practices change over time. The best practices document can be updated and maintained over time.
Prompt	I have written a report, which is a care and support assessment of the individual seeking care and support here <file name>. Can you read my companies guidance on best practices for report writing <file name>. Make some suggestions as to how I could improve my report. Show each sentence or paragraph you think I should change and then how I should change it based on the best practice.

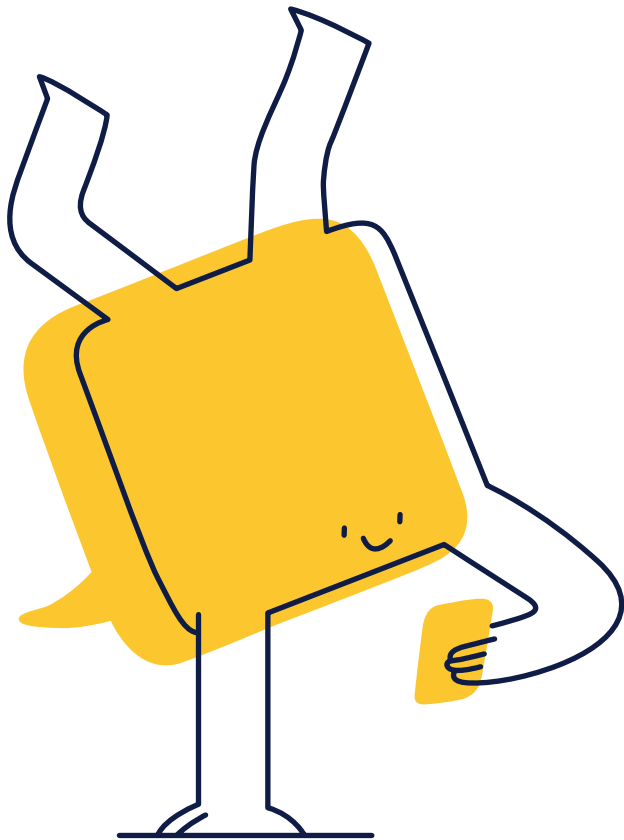


video guide

[10 Referencing Best Practices](#)

task

Translating Content



Role	Carrying out Statutory Assessments Reviewing of Statutory Assessments
Copilot	Microsoft Word
Situation	In this scenario a Microsoft Word document needs to be translated into another language. Copilot is used to create a new translation of the English text into Welsh from the existing file and keep the formatting of the original.
Benefit	Translating with Copilot saves time event if the draft translation is not the final version of the file.
Prompt	Translate this file <file name> into Welsh. Maintain any formatting in the new version.

video guide

[11 Translating Content](#)

Managing prompts

Microsoft Copilot for 365 offers several features to manage prompts effectively, enhancing productivity and collaboration. Here are some key features:

1. Saving Prompts

This feature allows users to save prompts they find particularly useful for future reference. By saving prompts, users can quickly access their favourite or frequently used prompts without having to recreate them each time.

To save a prompt, after running a prompt, the user should click the 'Save prompt' icon. This will bookmark the prompt, making it easily accessible from the Copilot Prompt Gallery. Saved prompts can be organised and managed within the gallery.

2. Sharing Prompts

Sharing prompts enables users to collaborate more effectively by allowing them to share good prompts with colleagues or team members. This feature ensures that best practices are shared across the organisation.

To share a prompt, the user can navigate to the prompt management pane, select the prompt, and choose the share button. They can then send the prompt via email or share it directly within Microsoft Teams. This makes it easy for others to use and benefit from the shared prompts.

3. Team Prompts

Team prompts are designed to be used collaboratively within a team or department. These prompts can be customised and saved for team-wide use, ensuring consistency and efficiency in team workflows.

Create a prompt and customise it to fit your team's needs. Save the prompt and select the option to share it with your team. Team members can then access and use the prompt from the shared prompt library within the Copilot Prompt Gallery. This feature is particularly useful for standardising processes and ensuring that all team members are on the same page.

The following is an additional video resource about Copilot good practices:

video guide

[12 Copilot Good Practices](#)

Top tips for using Copilot and creating prompts

The following are a selection of best practices to ensure that Copilot is used safely and effectively, and that can also be used when writing prompts for using Microsoft 365 Copilot.



Refreshing Chats

Creating a new chat in Copilot for 365 allows the user to start a fresh conversation on any topic or query. This helps keep interactions organised and focused, making it easier to manage different discussions and tasks separately. Creating a new chat in Microsoft Copilot is useful for several reasons:

1. **Fresh Context:** Starting a new chat allows you to begin with a clean slate, free from any previous context or interactions. This is particularly helpful when you want to discuss a new topic or task without any influence from past conversations. It ensures that Copilot's responses are focused solely on the new query, leading to more accurate and relevant answers.
2. **Organisation:** Keeping different topics or projects in separate chats helps maintain organisation. It makes it easier to find and refer to specific conversations later. For instance, you can have one chat dedicated to project planning, another for research, and yet another for personal queries. This way, your interactions remain structured and manageable.

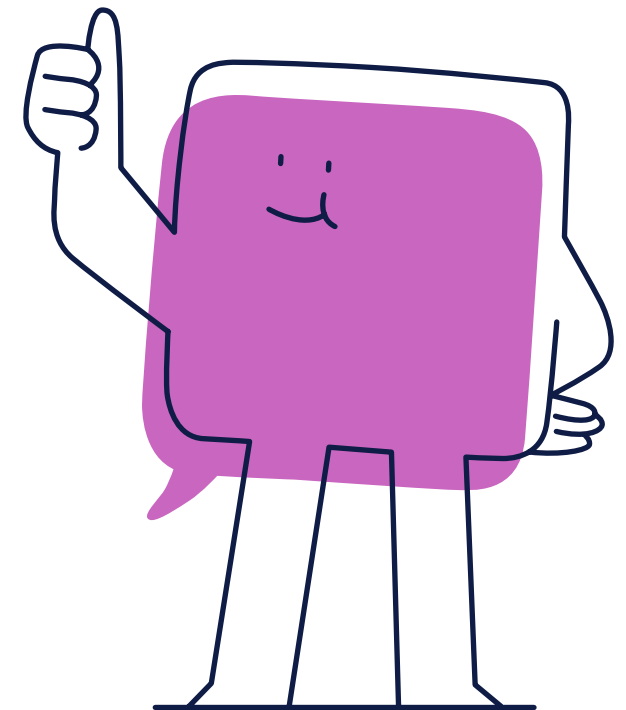
3. **Privacy and Confidentiality:** If you're discussing sensitive or confidential information, starting a new chat can help ensure that this information is contained within a specific conversation. This minimises the risk of accidentally sharing private details in unrelated chats.
4. **Improved Performance:** Over time, long and complex chats can become cumbersome. Starting a new chat can help improve the performance and responsiveness of Copilot, as it doesn't have to process an extensive history of interactions. This leads to a smoother and more efficient user experience.

Prompt Best Practices

A well-structured prompt ensures clarity, which helps Copilot understand the user's intent correctly. By providing specific details and context within the prompt, users can make sure Copilot focuses on the most important aspects of their question. Accurate prompts lead to relevant responses.

This is particularly important in complex tasks or when dealing with difficult topics, as it allows Copilot to break down the information methodically and provide well-rounded insights. Following best practices for prompt structure also helps users develop a habit of clear communication with Copilot.

The following are a selection of best practices that can be used when writing prompts for Microsoft 365 Copilot.



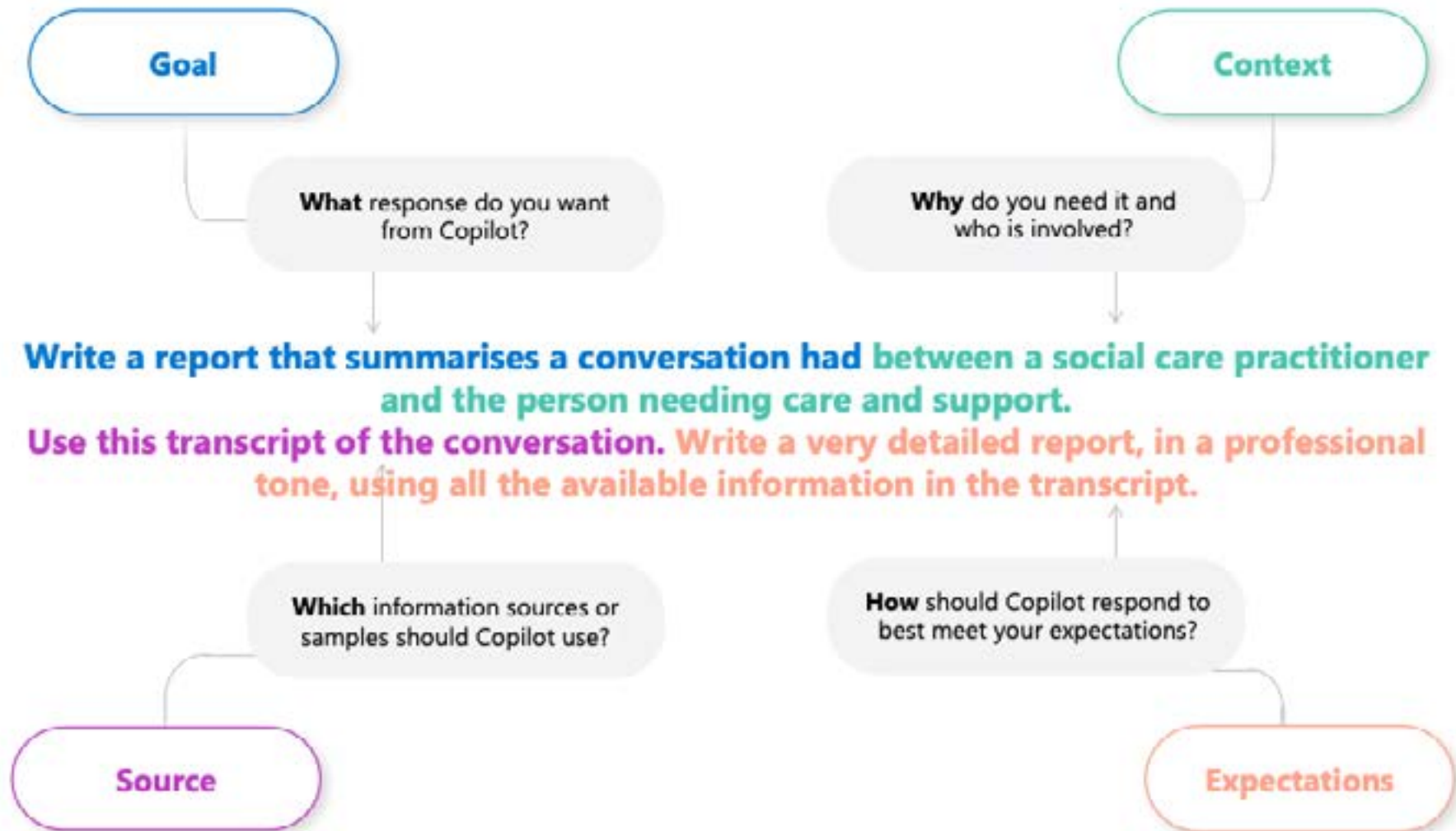
The GCSE Method

The Goal, Context, Source, and Expectations (GCSE) approach to prompt writing with Microsoft Copilot is a structured method designed to enhance the clarity and effectiveness of prompts.

- The Goal is the primary objective or desired outcome of the prompt. It defines what the user aims to achieve by interacting with Copilot. This could range from obtaining specific information, generating creative content, or completing a task. Clearly articulating the goal helps ensure that the response is aligned with the user's needs and expectations.
- The Context provides the background information necessary for Copilot to understand the situation fully. This includes any relevant details about the user's current state, previous interactions, or specific circumstances that might influence the response. By incorporating context, the prompt becomes more tailored and relevant, allowing Copilot to generate responses that are more accurate and useful. For example, knowing the user's location, time, or recent activities can significantly impact the relevance of the information provided.
- The Source refers to the origin of the information or the basis on which the response is generated. This could include specific documents, websites, or databases that Copilot should reference to provide accurate and reliable information. Specifying the source helps ensure that the response is grounded in credible and up-to-date information. It also allows users to verify the information if needed, enhancing the transparency and trustworthiness of the interaction.
- Finally, the Expectations outline the specific requirements or constraints for the response. This includes the desired length, format, tone, and any other preferences the user might have. Clearly stating the expectations helps Copilot tailor the response to meet the user's needs precisely. For instance, a user might request a brief summary, a detailed explanation, or a response in a particular style or tone.

By following the GCSE approach, prompt writing with Microsoft Copilot becomes more structured, efficient, and user-centric, leading to more satisfactory interactions.

Here's an example prompt using the GCSE method:



Practice and apply

Using the example prompts provided in this toolkit, practice creating your own prompts tailored to your specific needs. The more you practice, the more proficient you will become in using Copilot prompts to enhance your work. Experiment with different types of prompts and observe how Copilot responds. This hands-on approach will help you understand the nuances of prompt writing and enable you to refine your skills.

Remember, practice is key to mastering the use of Copilot prompts.

Collaborate and share

Collaboration is essential for maximizing the benefits of using Copilot prompts.

Share your prompts and experiences with your team members. By exchanging ideas and learning from each other, you can continuously improve and innovate. Encourage your colleagues to share their successful prompts and discuss how they can be adapted for different scenarios. This collaborative approach will foster a culture of learning and improvement, ensuring that everyone in the team can leverage the power of Copilot effectively.





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