

GETTING STARTED WITH Microsoft Copilot Chat

A quick guide to finding Copilot, writing better prompts, and using its most useful features.

No Tech Skills Needed

If you can send a Teams message, you already have what it takes to use Copilot. This guide walks through everything step by step.

What Is Copilot Chat?

Copilot Chat is Microsoft's AI assistant, available through your work account — like a knowledgeable coworker who can draft emails, summarize documents, brainstorm ideas, rewrite content, explain unfamiliar topics, and answer questions about files you upload.

Your data is secure

Your work account keeps conversations and data protected under Microsoft's Commercial Data Protection.

✓ Appropriate to Share	✗ Avoid Sharing
Confidential employee or donor data	Protected health information (PHI)
Financial account details	
Other restricted org data	

⚠ Important

Due to current Microsoft licensing restrictions, Copilot Chat is not HIPAA-compliant.

Step-by-Step Guide

1 Opening Copilot Chat

Go to m365copilot.com or msnpath.com and look for the **green shield** in the top corner, confirming your data is protected. You'll land in the chat view with a message box, suggested prompts, and recent chats.

(A Microsoft 365 Copilot app is also available in Self Service.)

2 Asking Copilot Better Questions

A good prompt usually has four parts:

CONTEXT + **GOAL** + **SOURCE** + **EXPECTATIONS**

Instead of...	Try...
Write something about our donor event.	Write a 3-sentence thank-you email to donors who attended the fall banquet, in a warm tone.
Write an email	Draft a friendly reminder to volunteers about Saturday's 8 a.m. setup time.
Summarize this	Summarize this document into five bullet points for a busy manager.
Make a presentation	Create a 5-slide outline for a donor update meeting.
Improve this	Rewrite this email in a more professional, concise tone.

Tips for Success

- ▶ **Use plain language.** Write the same way you'd ask a coworker — e.g., “Explain this policy in simple language.”
- ▶ **Ask for one thing at a time.** Start with a single request, then refine through follow-ups like “Make it shorter” or “Use a friendlier tone.”
- ▶ **Treat it like a conversation.** Keep refining: “Add more detail,” “Rewrite for a non-technical audience,” and so on.
- ▶ **Always verify important details.** Copilot can make mistakes — double-check dates, names, statistics, financial figures, and policy information before sharing.

3 Basic Features Worth Knowing

Feature	What It Does
New Chat	Start a fresh conversation for a new topic — keeps Copilot focused.
Chat History	Past conversations are saved automatically; reopen anytime from the left panel.
Attach a File	Use the paperclip icon to upload Word, PDF, PowerPoint, or Excel files, then ask Copilot to summarize or find details in them.
Suggested Prompts	Great starting examples on the home screen when you're not sure what to ask.
Copy Responses	Hover over a reply and click the copy icon to paste it into Outlook, Teams, or Word.
Regenerate	Don't like an answer? Regenerate for a different approach.
Voice Input	Use the microphone icon to speak instead of type.

Agents are specialized versions of Copilot built for a specific purpose — like HR guidance or internal policies. Find them in the Agents section of the left navigation, browse All Agents, and open one to see its purpose and sample questions. Use it just like regular Copilot; if it can't answer, switch back to a standard chat.

Tip: Type @ in some Copilot experiences to select an agent directly from the list.

A Few More Things

[Copilot Pages](#) turns a response into a shareable, editable page. [Image Creation](#) lets you generate simple graphics by describing what you want. [Copilot for Outlook](#) helps for drafting and summarizing emails.

Practice Activity

Open Copilot Chat and try these, in order:

- ☐ “Draft a friendly email reminding team members about Saturday's event starting at 8 a.m.”
- ☐ “In three bullet points, explain what Copilot Chat is and who it is for.”
 - ☐ Reply with: “Make this even simpler, as if you're explaining it to a friend.”

Five Prompts You'll Use Every Week

Writing: “Draft an email announcing _____.”

Summarizing: Attach a document and type “Summarize this document into five key takeaways.”

Brainstorming: “Give me 10 ideas for _____.”

Planning: “Create a project timeline for _____.”

Rewriting: Paste an email and type “Rewrite this in a more professional and concise tone.”

Quick Reference

Commented [ET1]: alphabetize

Term	What It Means
Generative AI	Software that understands natural language and generates content or answers.
Copilot	Microsoft's family of AI-powered assistants and experiences.
Prompt	The message or question you give Copilot.
Chat History	Saved record of your past Copilot conversations.
Agent	A specialized Copilot experience built for a specific purpose.

Need Help?

Contact the Innovation and AI team at Innovation@msnpath.com — we're happy to help.