

CoCounsel Release Notes: 5/8/24

Resources:

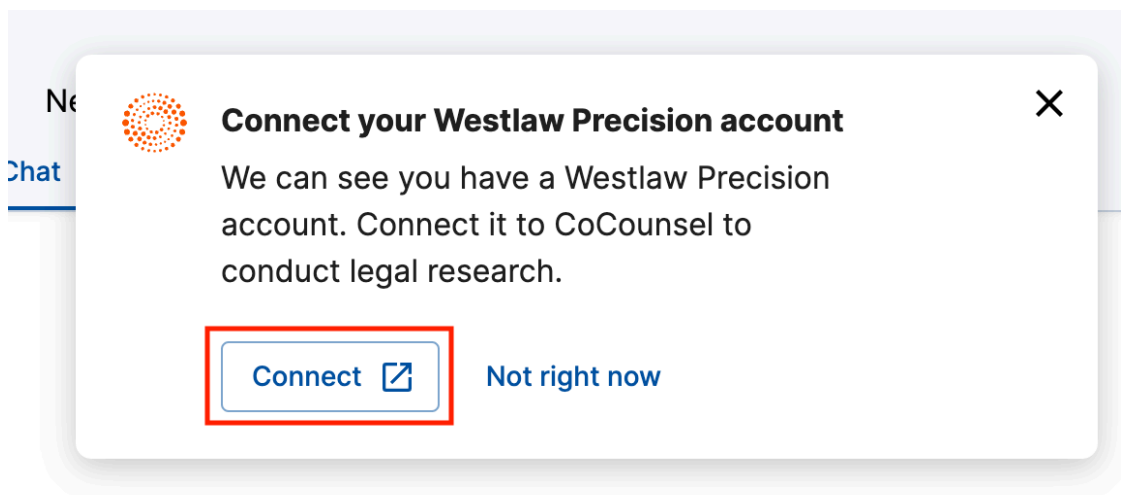
Our Help Articles provide robust resources on how to optimize CoCounsel. We strongly encourage users to read these articles, as they provide detailed information with video walkthroughs and more step-by-step guidance. **You can access Help Articles [here](#). You can also access video tutorials [here](#).**

Released: New Skill - AI Assisted Legal Research

For customers who are CoCounsel Core and Westlaw Precision subscribers, you now have the option to generate legal research questions in the CoCounsel application. The “AI Assisted Legal Research” (AALR) skill combines the chat interface of CoCounsel with the robust content provided in Westlaw Precision. **More detailed instructions for this skill can be found [here](#).**

First-Time AALR Users: Westlaw Precision Login Pop-Up

If you have never used the “AI Assisted Legal Research” skill, you will see a pop-up on the CoCounsel chat screen:



Clicking “Connect” will lead you to the Westlaw Precision login page to enter your credentials. a pop-up will appear log in to Westlaw Precision:

THOMSON REUTERS

CoCounsel
Sign in using OnePass

Username [Forgot username?](#)

Password [Forgot password?](#)

Show

Sign in

Access with single sign-on

For this flow, you can proceed to Step 3 after logging in. Step 1 will show how to log in through CoCounsel chat without the first-time “Connect your Precision Account” pop-up.

Step 1: Enter your legal research prompt in CoCounsel chat, invoke “AI Assisted Legal Research”

From CoCounsel chat, enter in your legal research prompt. CoCounsel will invoke the “AI Assisted Legal Research” skill by confirming your access to Westlaw Precision, and show the “AI-Assisted Research” gray skill pill (seen in the [blue](#) box below):

Statute of Limitations for Fraud in Texas

Chat Results

M 11:04 AM
What is the statute of limitations for fraud in Texas?

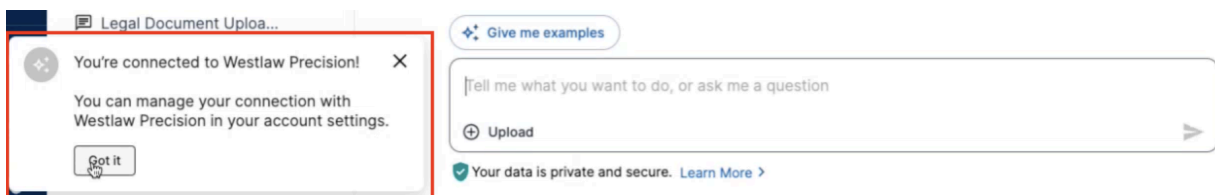
CoCounsel 11:04 AM AI-Assisted Research
I understand you want to know the statute of limitations for fraud in Texas.
We can see you have a Westlaw Precision account. Connect it to CoCounsel to conduct legal research.

Connect to Westlaw Precision Nevermind

Step 2: Log in to your Precision account

After putting in your legal research prompt in CoCounsel, click on “Connect to Westlaw Precision” (shown in the red box above). From here, a pop-up will appear log in to Westlaw Precision:

After logging in to your Precision account, you will be directed to the same chat in CoCounsel. A notification will appear at the bottom left-hand corner to confirm your Westlaw Precision account is connected:



Step 3: Trigger the “AI-Assisted Legal Research” skill

You can edit your prompt, or click the purple “Submit Request” button to trigger the skill:

CoCounsel 11:04 AM AI-Assisted Research

I understand you want to know the statute of limitations for fraud in Texas.

Your request

Prompt ⓘ

What is the statute of limitations for fraud in Texas?

Cancel Submit request

Step 4: Expand Results, Download, or Iterate

When the skill is 100% completed, you can expand and view the results:

>> Researching: What is the statute of limitations for fraud in Texas? AI Assisted Research

100% Complete

REQUEST [Hide research request ^](#)

What is the statute of limitations for fraud in Texas?

RESPONSE

The statute of limitations for fraud in Texas is generally four years [1]. This period commences from the date of the fraudulent act, usually when the defendant makes the allegedly false representations [2]. If the fraud is concealed, the clock on the statute of limitations begins from the time the party knew or reasonably should have known of the misrepresentation [3].

There are some exceptions to this rule. In cases involving fiduciary relationships, a different set of rules might apply as the Texas Legislature has established a four-year statute of limitations for breach of fiduciary duty [4]. Furthermore, if a party prevents another from seeking redress within the period of limitations through their own fraud, this principle known as "fraudulent concealment" serves as an equitable estoppel to the defense of limitations.

Moreover, fraudulent concealment can also toll or suspend the statute of limitations until the plaintiff learns, or should have learned, of the facts giving rise to their cause of action [5]. However, in probate proceedings, there remains an open question as to whether fraud may toll the statute of limitations [6].

It's also worth noting that a breach-of-contract claim cannot be recast as a fraud claim to avoid the statute of limitations. To establish fraudulent inducement, the elements of fraud must be established as they relate to the agreement between the parties [7].

However, the information derived from "Williams v. Khalaf" and "Hooks v. Samson Lone Star, Ltd. Partnership" may not fully represent the current state of the law as these judgments were reversed or modified upon appeal.

Sources (23) ^

1. Milestone Properties, Inc. v. Federated Metals Corp.. 867 S.W.2d 113
Court of Appeals of Texas, Austin. • December 08, 1993 • 867 S.W.2d 113 • 1993 WL 502491

...Milestone contends that a negligent misrepresentation claim is subject to a four-year statute of limitations because it is more like a claim for fraud than a claim for negligence.

Is this helpful?

Ask follow-up question (5 remaining) Download Copy

At the bottom of your expanded results, you have the options to:

1. Iterate: Ask up to 5 follow-up questions,
2. Download results in word format,
3. Copy results to paste on your document of choice.

More detailed guidance on “AI-Assisted Legal Research” can be found in this [article](#).

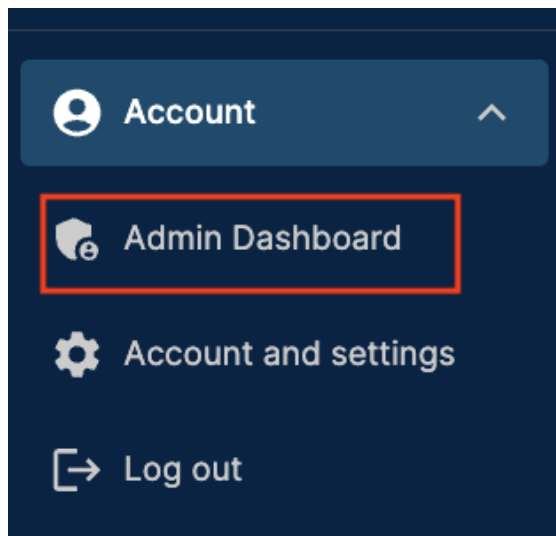
Released: Enhancement - Chat & Non-skill Messages in Admin Dashboard

Organization Administrators now have the capability to view additional data for Members:

1. The number of chats and
2. The number of non-skill messages (messages where skills were not triggered).

Step 1: Go to Admin Dashboard > CoCounsel usage

In CoCounsel, select “Admin Dashboard” on the lower left-hand sidebar:



Select the “CoCounsel usage” tab:

Admin Dashboard

CoCounsel usage

AllSearch usage

Member permissions

Step 2: View Member Chats Created and Non-Skill Messages

The Admin Dashboard for usage will show 2 additional columns for Members' chats being used and the # of non-skill messages for the span of time set at the top of the dashboard:

CoCounsel usage

Start: 01/01/2024 to End: 05/07/2024

Export

Organization	# of active chats	# of non-skill messages	# of skill runs	
Casetext	469	830	5,744	View Skill Breakdown

Export

Member	# of active chats	# of non-skill messages	# of skill runs	
	1	3	6	View Skill Breakdown
	6	13	1	View Skill Breakdown
	0	0	4	View Skill Breakdown
	1	1	7	View Skill Breakdown
	0	0	6	View Skill Breakdown
	17	29	38	View Skill Breakdown
	15	28	125	View Skill Breakdown
	0	0	2	View Skill Breakdown
	9	14	17	View Skill Breakdown
	7	8	6	View Skill Breakdown

Rows per page: 10 1-10 of 47

What do these new data points mean?

Active chats are non-deleted chats users have created, seen on the left-hand side panel of CoCounsel. Non-skill messages are interactions where skills are not triggered from CoCounsel. Non-skill messages have no skill pill icon, have no progress bar, and have no option of downloading or expanding results. Examples of both are shown in the red boxes below:

C Workspace

Sort by date + New

Today

- Understanding EDGAR ...

Past 7 Days

- Deposition Transcripts ...
- Deposition Overview: ...
- AllSearch EDGAR 2022...
- Tour de France USPS ...
- Varsity Blues Bribery S...

Past 30 Days

- Document Identificatio...

Understanding EDGAR Filings

Chat Results

C Christine Byon 6:50 PM
What are EDGAR filings?

C CoCounsel 6:50 PM

EDGAR, which stands for Electronic Data Gathering, Analysis, and Retrieval system, is the primary system used by the U.S. Securities and Exchange Commission (SEC) to facilitate the electronic submission and retrieval of company filings. Public companies, certain insiders, and broker-dealers are required to submit documents to the SEC via EDGAR.

The types of filings available on EDGAR include, but are not limited to:

- **Annual Reports (10-K):** Comprehensive reports of a company's performance that must be submitted annually.
- **Quarterly Reports (10-Q):** Reports detailing a company's quarterly financial performance.
- **Proxy Statements (DEF 14A):** Information provided to shareholders prior to shareholder meetings.
- **Current Reports (8-K):** Disclosures on certain events within four days after they occur.
- **Registration Statements:** For when companies register new securities for sale to the public (e.g., S-1, S-3 forms).

[Give me examples](#)

Tell me what you want to do, or ask me a question