

COPILOT INTERACTION CHECKLIST

Same outcome. Less noise.

Use this before June 1, then keep it nearby for every Copilot chat, edit, or agent run.

1. Check the billing basics

- Preview bill:** I checked the Billing Overview page and [downloaded the usage report](#) so I know current usage before the switch.
 - Unlimited work:** I know inline completions and Next Edit suggestions stay outside the credit system on paid plans.
 - Credit burners:** I know premium models, chat with context, advanced completions, and agentic workflows are the areas to watch.
 - Code review:** If Copilot code review is automated, I checked both AI Credits and GitHub Actions minutes.
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2. Scope the task

- Target:** I named the file, function, issue, failing test, or workflow.
 - Change:** I described what needs to be different when the task is done.
 - Constraints:** I included tests, style, APIs, edge cases, and boundaries.
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3. Pick the smallest useful mode

- Ask:** Explanation, syntax, summary, or one-step question.
 - Edit:** I know the target file and want a contained change.
 - Agent:** The work needs exploration, commands, validation, or multiple steps.
 - Agent reserve:** I am not using Agent Mode for a simple lookup or "what does this function do?" question.
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4. Trim the context

- I closed unrelated tabs, removed stale context, and started a new chat when the topic changed.
- I kept only instructions that prevent expensive mistakes: landmines, required commands, security cautions, and conventions easy to violate.

- I moved file-type or path-specific guidance into scoped instructions with **applyTo:** instead of loading it for every request.
 - I moved repeatable playbooks into prompts, agents, or Skills instead of always-on repo instructions.
 - I trimmed long conversations to the last useful turns or summarized older context.
 - I kept generated output, vendor files, large data, and unrelated logs out of routine context.
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5. Control the output

- I added or used output defaults such as "Code only, no explanation unless asked."
 - I requested the smallest useful format: code-only, three bullets, JSON, table, or one sentence.
 - I gave a stop condition for agent work.
 - I asked for validation only where it changes confidence.
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6. Route by model and complexity

- Default:** I am not leaving the most expensive model pinned for routine work.
 - Simple work:** I used a lower-cost model or Auto for lookup, summary, classification, docs, or small tweaks.
 - Hard work:** I reserved premium models for architecture, thorny debugging, security, or long-context reasoning that needs them.
 - Local option:** I considered a local model for zero-credit, private, or regulated workflows.
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7. Audit tools and MCP servers

- I disabled MCP servers and tools that are not needed for the current task.
- I used Skills for repeatable workflows that need instructions, not always-loaded tool schemas.
- I used CLI commands for deterministic work such as search, formatting, tests, GitHub CLI, jq filters, or repeatable Playwright flows.
- I used MCP only when protocol, auth, sandboxing, governance, or remote APIs matter.
- I filtered command output before returning it with targeted commands, **| head**, or **| jq**.
- I used built-in tools instead of broad integrations when they already cover the workflow.
- I split genuinely independent work instead of duplicating the same context across agents.

8. Admin and team controls

- Business or Enterprise budgets are set at the enterprise, cost-center, or user level before spend surprises anyone.
- Premium model access is reviewed by workflow, team, and measurable need.
- The team has agreed on defaults for mode choice, output length, model routing, and MCP/tool setup.

Five-minute setup

- Add terse output defaults: **Code only, no explanation unless asked. Bullets over paragraphs.**
- Delete generated boilerplate from **copilot-instructions.md** and **AGENTS.md**.
- Disable unused MCP servers before the next agent run.
- Move one repeated workflow into a prompt or Skill.
- Set model selection to Auto unless a specific task needs a specific model.

Prompt template

In [target], change [behavior]. Keep [constraints]. Use [mode/output]. Stop when [done condition].

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