

AI Use Policy

A ready-to-use template for small and mid-sized businesses. Customize the bracketed fields and share with your team.

COMPANY NAME

EFFECTIVE DATE

POLICY OWNER

LAST REVIEWED

1. Purpose

This policy provides guidelines for the use of artificial intelligence tools in our workplace. Our goal is to help everyone on the team use AI effectively while protecting our business, our clients, and our data.

2. Approved Tools

The following AI tools are approved for business use:

CUSTOMIZE THIS LIST

1. [Tool name, e.g., ChatGPT Team] – approved for [use case]
2. [Tool name, e.g., Microsoft Copilot] – approved for [use case]
3. [Tool name] – approved for [use case]

These tools have been reviewed for data privacy and security. Using AI tools not on this list for work purposes is not permitted without prior approval (see Section 4).

3. Data Boundaries

You may use approved AI tools with: general business content that does not contain client-identifiable information, financial data, credentials, or legally protected material. Examples: drafting marketing copy, summarizing publicly available research, brainstorming ideas, improving the clarity of your own writing.

Do not enter the following into any AI tool, including approved ones:

✗ *Client names paired with financial or personal data*

✗ *Health or medical records*

✗ *Social Security numbers or government IDs*

✗ *Contract terms or legal documents*

✗ *Passwords or access credentials*

✗ *Employee performance or compensation data*

✗ *Proprietary source code or trade secrets*

✗ *Any data subject to regulatory protection*

Rule of thumb: if it should not appear on a public website, do not paste it into an AI tool.

4. Requesting a New Tool

If you would like to use an AI tool that is not on the approved list, submit a request to [name/role]. Include:

- *The tool name and URL*
- *What you want to use it for*
- *What data it would need access to*

Requests will be reviewed within [X business days]. Approved tools will be added to the list in Section 2.

5. Ownership of AI-Generated Work

Content created with the assistance of AI tools during the course of business operations is the property of [company name], subject to the same intellectual property policies that apply to all work product.

Employees should not represent AI-generated content as entirely their own original work when accuracy of authorship matters (for example, in expert testimony, credentialed professional opinions, or signed attestations).

6. Accountability

Questions about this policy should be directed to [name/role]. This person is responsible for:

- *Reviewing the approved tools list quarterly*
- *Updating data boundaries as new regulations or business requirements emerge*
- *Addressing any reported concerns about AI use*

7. Policy Violations

Violations will be addressed on a case-by-case basis. Unintentional misuse will be treated as a learning opportunity with additional training provided. Repeated or deliberate violations, especially those involving

client data or credentials, may result in disciplinary action.

The goal of this policy is to help you use AI safely, not to catch you doing something wrong. If you are unsure whether something is okay, ask before you paste.

8. Review Schedule

This policy will be reviewed every [quarter / 6 months]. The next scheduled review is [date]. Changes will be communicated to all team members.