

Purpose of this guide

This checklist helps University of North Carolina System Office employees review Microsoft 365 Copilot Chat outputs before using them in emails, documents, meetings, webpages, decisions, or other work products.

Copilot Chat can assist with drafting, summarizing, and organizing information, but AI-generated content should not be treated as final without review.

This guide supports responsible use, protects institutional data, and reinforces employee accountability.

System Office access note: Most employees should expect to use Copilot Chat through the standalone Microsoft 365 chat experience, Outlook, and Teams. Full native Copilot features inside every Microsoft 365 app may not be available to every account. Some approved accounts may see additional capabilities based on role, license assignment, app availability, Microsoft rollout timing, and System Office configuration.

How to use this checklist

Use this checklist after Copilot Chat provides a response and before you:

- Copy content into an email or document
- Share content with others
- Publish content
- Rely on content for decisions or actions

Choose the right level of review

For low-risk tasks, our checklist may be sufficient. For higher-impact work, review all sections below.

Quick review checklist

Before using a Copilot Chat output, ask

- Is the output accurate?
- Is the tone appropriate for the audience?
- Is the response complete enough for the task?
- Did Copilot Chat add information I did not provide?
- Are any facts, dates, figures, policies, or requirements verified?
- Is the content appropriate to share?

- Does the content avoid Tier 3 data?
- Does this need supervisor, subject-matter expert, legal, HR, security, or data governance review?

If you cannot confidently answer questions, revise, verify, or ask for guidance before using the output.

Detailed review areas

1 Review area 1: Accuracy

Check whether the output is factually correct.

Ask

- Are the facts correct?
- Are names, dates, numbers, and details accurate?
- Did Copilot Chat assume something that was not provided?
- Did it invent, exaggerate, or overstate anything?
- Does this need to be checked against an official or approved source?

Action

Verify important facts using official or approved sources before relying on the output.

2 Review area 2: Completeness

Check whether the output includes everything needed for the task.

Ask

- Does it answer the actual question?
- Does it leave out important context?
- Are next steps, owners, deadlines, or dependencies missing?
- Are open questions or assumptions clearly identified?
- Does the response need more detail — or less?

Action

Revise the output yourself or ask Copilot Chat to improve it before using.

Example follow-up prompt

Add a short section listing assumptions, missing information, and open questions.

3 Review area 3: Tone and audience

Check whether the output sounds right for the intended audience.

Ask

- Is the tone professional and appropriate?
- Is the language too formal, too casual, too promotional, or too technical?
- Is the response clear for the intended audience?
- Does it sound practical and human?
- Does it avoid hype or exaggerated claims?

Action

Ask for a tone revision if needed.

Example follow-up prompt

Rewrite this for a professional internal audience. Keep it clear, calm, and helpful. Avoid marketing language.

4 Review area 4: Data safety

Check whether the content includes information that should not be used or shared.

Ask

- Does the output include Tier 3 data or other information that is restricted, regulated, confidential, sensitive, or not approved for AI use?
- Did the prompt, file, image, or screenshot include information that should not have been entered or uploaded?
- Does the output reveal sensitive, restricted, confidential, or regulated information?
- Should names, identifiers, or specific details be removed?
- Is the content appropriate for the intended audience?

Action

Do not use or share outputs that include inappropriate data.

If sensitive information may have been entered, follow System Office guidance immediately.

Reminder

Pause before sharing any output that may contain sensitive, restricted, confidential, or regulated information. Tier 3 data must not be entered, pasted, uploaded, or exposed in AI tools.

5 Review area 5: Unsupported additions

Check whether Copilot Chat added information not supported by the prompt or source material.

Ask

- Did it add facts I did not provide?
- Did it imply sources or authority I did not verify?
- Did it fill in missing details without labeling them as assumptions?
- Did it make the answer sound more certain than it should?

Action

Remove unsupported content or ask Copilot Chat to revise.

Example follow-up prompt

Remove information that is not supported by the source text. If using an assumption, label it clearly.

6 Review area 6: Policy, legal, HR, security, or compliance sensitivity

Some topics require extra care.

Ask

- Does this involve policy interpretation?
- Does this involve legal, HR, security, financial, compliance, or data governance topics?
- Could this affect an employee, student, vendor, institution, or decision process?
- Does this require review by a responsible office before use?

Action

Do not rely on Copilot Chat as the final authority for sensitive or high-impact topics. Escalate or verify through the appropriate channel.

7 Review area 7: Final use

Before finalizing the content, ask:

- Am I comfortable being responsible for this final content?
- Does it require approval before being sent or published?
- Should I disclose that AI helped create an early draft?
- Is the final version aligned with System Office tone and guidance?
- Have I removed placeholders, brackets, draft notes, unsupported claims, and any information that should not be shared?

Action

Finalize only after review, revision, and any required approval.

Useful follow-up prompts for review

Use these prompts to improve Copilot Chat responses:

Practical workflow: If you do not have native Copilot access inside a specific Microsoft 365 app, use Copilot Chat to draft, summarize, outline, create CSV-style content, or generate text. Review the output carefully, then move the final content manually into Word, Excel, PowerPoint, Outlook, Teams, or another approved app.

Check for clarity

Review this draft for clarity, organization, and possible reader confusion. Do not rewrite it yet. First, list suggested improvements.

Make it more concise

Rewrite this to be shorter and clearer. Keep the meaning the same. Do not add new facts.

Identify assumptions

List any assumptions in this response. Also identify what information should be verified before use.

Remove unsupported claims

Remove anything that is not supported by the source text. Do not add new facts.

Adjust tone

Rewrite this for a professional internal audience. Use a clear, calm, and helpful tone.

Create a final checklist

Create a short final review checklist for this draft before it is shared.

Output review worksheet (optional)

Use this worksheet for important or high-impact outputs.

Review question	Yes / No / Unsure	Notes
Is the output accurate?		
Are important facts verified?		
Is the tone appropriate?		
Is the output complete enough?		
Did Copilot Chat avoid unsupported additions?		
Does the output avoid Tier 3 data?		
Is the content appropriate to share?		
Does this need review or approval?		
Am I comfortable being responsible for the final version?		

Final reminder

Pair Copilot Chat with human judgment

Copilot Chat is most effective when paired with human judgment, review, and accountability. Use it to draft and organize ideas — then verify, refine, and approve before relying on the output.