

Purpose of this guide

This guide helps University of North Carolina System Office employees use Microsoft 365 Copilot Chat responsibly.

It focuses on:

- Data safety
- Appropriate use
- Output review
- Practical habits that reduce risk

Copilot Chat can support everyday work, but employees remain responsible for protecting institutional data, reviewing outputs, and following System Office guidance.

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.

Core rule

Do not enter, paste, upload, or expose Tier 3 data (consult official Data Classification policy)

This includes:

- Entering Tier 3 data directly into a prompt
- Copying and pasting Tier 3 data into chat
- Uploading files that contain Tier 3 data
- Using AI tools in ways that could expose Tier 3 data indirectly

If you are unsure whether information is appropriate to use, pause and ask before proceeding.

What responsible use means

Responsible use of Copilot Chat means using it in a way that is:

- Appropriate for the work task
- Consistent with System Office guidance
- Respectful of data-classification requirements
- Reviewed by a human before use

- Transparent when review or approval is needed
- Limited to information that is safe and appropriate to share with the tool

Copilot Chat can help produce drafts and ideas, but it should not be treated as a final authority.

Before using Copilot Chat

Before you prompt Copilot Chat, ask yourself:

- Am I signed in with my approved System Office Microsoft work account?
- Is this task appropriate for Copilot Chat?
- Is the information appropriate for AI use?
- Have I removed sensitive, restricted, or unnecessary details?
- Am I avoiding Tier 3 data?
- Will I review and verify the output before using it?
- Do I need approval or guidance before proceeding?

If any answer is unclear, pause.

Appropriate starting points

Good responsible-use starting points include:

- Drafting a short internal email from non-sensitive notes
- Rewriting approved text for clarity
- Summarizing public or approved content
- Brainstorming project questions
- Creating a checklist for routine work
- Organizing meeting notes that do not contain restricted information
- Explaining a general concept in plain language

Start with low-risk tasks while learning how Copilot Chat responds.

Information to avoid

Do not use Copilot Chat with information that is not approved for AI use.

Avoid entering or uploading

- Tier 3 data
- Sensitive personal information
- Regulated information
- Confidential or restricted records
- Privileged information
- Security-sensitive details

- Personnel or HR details not approved for AI use
- Student, employee, legal, financial, or operational details requiring special handling

This list is not exhaustive. Always follow System Office data-classification and responsible-use guidance.

Use less data when possible

When Copilot Chat needs context, provide only what is necessary.

Instead of including exact names, identifiers, or sensitive details, consider using:

- Placeholders
- Summaries
- Generalized descriptions
- Public information
- Approved excerpts
- Non-sensitive examples

Example

Instead of

Rewrite this message about [specific person, case, or restricted detail].

Use

Rewrite this general message for an internal audience.

Keep the tone professional and concise.

Review every output

AI-generated outputs can be useful, but they can also be wrong, incomplete, outdated, or overly confident.

Before using a response, check for:

- Accuracy
- Appropriate tone
- Completeness
- Assumptions
- Missing context
- Unsupported claims
- Invented facts
- Whether the output is appropriate to share
- Whether the output needs supervisor or subject-matter expert review

Do not copy and send Copilot Chat output without reviewing it.

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.

Verify important information

Use official sources to verify:

- Facts
- Dates
- Requirements
- Policies
- Procedures
- Figures
- Decisions

Copilot Chat can help organize or explain information, but final verification should come from:

- Official University of North Carolina System Office sources
- Approved Microsoft documentation
- Authoritative public sources
- Subject-matter experts
- Supervisors or responsible offices
- Legal, HR, security, or data-governance contacts when appropriate

Be careful with decisions

A feature appearing in an app does not automatically mean it is available or approved for every account. Follow System Office guidance for which Copilot features and apps are appropriate for your role.

Do not use Copilot Chat as the final decision-maker for:

- Policy interpretation
- HR or personnel matters
- Legal or compliance questions
- Procurement decisions
- Financial decisions

- Security-sensitive work
- Student or employee records
- High-impact communications
- Sensitive institutional matters

Drafting support, not decision authority

Use Copilot Chat for drafting, organizing, and thinking support.

Keep final decisions with responsible employees and approved processes.

Responsible prompt examples

Appropriate drafting prompt

Draft a short internal reminder about [general topic].

Use a professional and helpful tone.

Do not include sensitive details.

Appropriate summarizing prompt

Summarize this approved public text into five key points and three action items.

Do not add information that is not in the text.

Appropriate planning prompt

Help me create a checklist for a routine project kickoff.

Include preparation steps, meeting topics, and follow-up items.

Appropriate review prompt

Review this approved draft for clarity, tone, and organization.

Do not add new facts.

When to pause and ask

Pause before using Copilot Chat if

- The information may be Tier 3 data
- A file may include sensitive or restricted content
- The task involves legal, HR, financial, security, or compliance matters

- You are unsure which account you are using
- The output may be used for an important decision
- The response will be shared broadly
- You are unsure whether the use case is approved

Placeholder for final version

[Insert approved IT, security, data governance, or support contact]

Responsible-use checklist

Before using Copilot Chat

- I am using my approved Microsoft work account
- I have confirmed the information is appropriate for AI use
- I have avoided Tier 3 data
- I have included only the necessary context
- I have removed sensitive or unnecessary details
- I understand that Copilot Chat may make mistakes
- I will review and verify the output
- I will ask for guidance if unsure

Final reminder

Your responsibility does not transfer to the tool

Copilot Chat can help you work more efficiently, but it does not remove your responsibility to:

- Protect institutional data
- Use judgment
- Verify information
- Follow University of North Carolina System Office guidance