

## Purpose of this guide

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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.

## Core rule

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### **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

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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

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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

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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

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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

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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

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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.

## Verify important information

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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

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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

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### 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

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### 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

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### 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

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### 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