

# AI Usage Policy Template

TechEd Analyst Template | Version 1.0

*All templates, playbooks, and guides are provided for informational and operational guidance purposes only. They do not constitute legal, financial, compliance, or professional advice. You are responsible for determining whether any content is appropriate for your specific situation.*

## 1. Purpose and scope

Business: [your business name] Effective date: [date] Applies to: [all staff / contractors / specific roles]

This policy describes how [your business] uses AI tools in day-to-day work. It is an internal operating document — not legal advice and not a compliance guarantee. Adjust scope and rules to fit your situation and [check your local obligations with counsel if needed].

## 2. Approved tools

| Tool   | Approved use | Owner  |
|--------|--------------|--------|
| [tool] | [use case]   | [name] |

Default rule for unlisted tools: Ask [owner] before using any AI tool not on this list.

## 3. Acceptable uses

- Drafting internal documents from non-sensitive inputs
- Summarizing meeting notes the team already has permission to store
- [add your acceptable uses]

## 4. Prohibited uses

- Pasting customer PII, health data, financial account details, or credentials into consumer AI tools
- Using AI output as final without human review when the decision affects customers, pricing, or safety
- [add your prohibited uses]

## 5. Data handling rules

Never paste into AI tools without explicit approval:

- [list categories — e.g., client names + situations, employee records, unreleased financials]

Before using a new tool: Check whether it trains on user inputs by default and whether an opt-out exists.

## 6. Human-review checkpoints

Outputs require human review before use when they:

- Go to a customer or external party
  - Affect pricing, hiring, or legal commitments
  - [add your checkpoints]
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## 7. Ownership and review

Policy owner: [name / role] Review cadence: [quarterly / semi-annual] Last reviewed: [date]

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*Customize every bracketed field. This template is a starting point for team rules — not a substitute for legal review of your specific obligations.*

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