

Employee Quick Guide: Which tier is this?

Not sure if something is okay to put into AI? Find the closest example below: "never" means it stays out of every AI tool, "approved" means use only Microsoft 365 Copilot or ChatGPT Enterprise/Team through your company account, and "any" means it is public or harmless enough for any tool.

✗ Never = never in any ai tool **• Approved tools only** = only in approved tools **✓ Any tool** = fine in any ai tool

#	SITUATION	TIER	WHY
1	A customer reads you their credit card number over the phone and you want AI to help fill out the order form.	✗ Never	Card numbers and security codes fall under PCI DSS and must never be typed or pasted into any AI tool, including approved ones.
2	An engineer wants help debugging code that controls a production line machine.	• Approved tools only	Our internal code and equipment details are company confidential, so use ChatGPT Enterprise/Team or Microsoft 365 Copilot on your company account, never a free personal account.
3	A sales rep wants to polish a quote email to a customer that includes pricing and discount terms.	• Approved tools only	Pricing and customer terms are confidential, so draft it in Microsoft 365 Copilot or ChatGPT Enterprise/Team rather than a personal or unapproved writing tool.
4	You want to rewrite a public job posting for a machine operator role to make it friendlier.	✓ Any tool	The posting will be public anyway and contains no private details.
5	An HR team member wants AI to summarize a disciplinary file or medical leave notes for an employee.	✗ Never	Sensitive personal information about coworkers stays out of AI tools; handle it directly.
6	A quality engineer wants AI to summarize this month's defect reports and scrap rates from a spreadsheet.	• Approved tools only	Internal quality data is confidential, and Microsoft 365 Copilot or ChatGPT Enterprise/Team on your company account is the right place for it.
7	You want a general explanation of how a CNC lathe works or what lean manufacturing means.	✓ Any tool	This is general public knowledge with no company information in the question.
8	Someone wants to paste a customer's proprietary part drawing or specs, shared under an NDA, into AI.	✗ Never	Customer drawings under NDA belong to the customer, so do not put them in any AI tool unless Dana Whitfield (IT Director) confirms in writing it is allowed.
9	A purchasing coordinator wants to draft meeting notes and action items from a supplier call in Teams.	• Approved tools only	Supplier names, costs and plans are internal business information, so use Microsoft 365 Copilot through your company account.

#	SITUATION	TIER	WHY
10	You want to brainstorm fun ideas for the plant's summer safety picnic.	✓ Any tool	Nothing confidential is involved, so any tool is fine.

When in doubt, treat it as "never" and ask Dana Whitfield (IT Director) first, or email ai-requests@example.com if you want to use a tool that is not on the approved list.