

New AI Tool Request Form

Any Example Manufacturing Co. employee who wants to use an AI tool that is not already approved (Microsoft 365 Copilot or ChatGPT Enterprise/Team) fills in this form, including tools you already use on a personal account for work tasks. Send the completed form to ai-requests@example.com, and Dana Whitfield, IT Director, will get back to you with an answer within two weeks.

YOUR NAME

DEPARTMENT

DATE

1. What is the tool? (name, vendor, website)

2. What problem does it solve for you?

3. What data would go into it? Which tier is that data?

4. Who else would use it?

5. Does the vendor train its AI on customer data? (Get the answer in writing from the vendor.)

6. Will this tool ever see, store or process payment card information (card numbers, expiration dates, security codes or customer billing details), even by accident? If yes, describe where that data would come from.

7. Will you put engineering drawings, CAD files, product specifications, process documents, source code, or customer or supplier pricing into this tool? If yes, list which kinds.

8. Will this tool connect to any plant floor, production, ERP or other internal business systems, or only be used through a web browser or desktop app?

For the policy owner (Dana Whitfield, IT Director)

☐ Check whether Microsoft 365 Copilot or ChatGPT Enterprise/Team already meets the need before approving a new tool.

- ☐ If the tool could touch payment card data, confirm it stays outside the PCI DSS cardholder data environment, or get the vendor's PCI DSS responsibilities confirmed in writing.
- ☐ Get written confirmation from the vendor on data retention, whether customer data is used for training, and where data is stored.
- ☐ Confirm the tool can be used with company accounts (not personal ones) and fits the monitoring already in place on company devices.
- ☐ Confirm the requester's manager supports the request and that a named owner and budget are in place: [cost center or budget code].

Decision: ☐ Approved ☐ Approved with conditions ☐ Not approved

Answer sent by (within two weeks of the request): _____