

Rollout Checklist

Owner: Dana Whitfield, IT Director

1. Confirm the owner

- ☐ Dana Whitfield, IT Director owns this policy, answers tool requests, and runs the six-month review.
- ☐ HR and legal have reviewed the policy before it is published.

2. Publish and track acknowledgment

- ☐ Dana Whitfield (IT Director) confirms in writing with Microsoft and OpenAI how Microsoft 365 Copilot and ChatGPT Enterprise/Team handle company data (retention, training on our data, access controls), then finalizes the policy and posts it at [intranet or SharePoint policy location].
- ☐ Dana Whitfield emails the policy to all staff in Ohio and Indiana with a request to read it (under five minutes) and acknowledge it by [acknowledgment due date], using [acknowledgment tool, e.g. a Microsoft Forms quiz or HR system].
- ☐ Managers in engineering, sales, the plant floor and finance confirm their teams have moved drafting and code work off personal or free AI accounts and onto Microsoft 365 Copilot or ChatGPT Enterprise/Team, and that any browser writing extensions not on the approved list are submitted to ai-requests@example.com for review.
- ☐ Dana Whitfield tracks acknowledgment rates weekly by department, sends reminders through managers to anyone outstanding after [number] days, and adds the policy and the 10-minute training to new-hire onboarding.

3. 10-minute training

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| 0-2 min | Why we have this policy. AI tools can save us real time, like drafting a supplier email or summarizing a long maintenance log. But anything you paste into an AI tool leaves your screen, so we need to use the right tools in the right way. Today we'll cover which tools to use, what never goes into them, and who to ask. |
| 2-4 min | Our two approved tools. Use Microsoft 365 Copilot for work inside Outlook, Word, Excel and Teams, and ChatGPT Enterprise/Team with your company login for drafting and code help. If you've been using a personal or free AI account for engineering drafts or scripts, switch to ChatGPT Enterprise/Team today, because personal accounts aren't covered by our company agreements. If you use any other AI tool or writing extension, including in sales, send it to ai-requests@example.com so IT can review it. |
| 4-6 min | What never goes into AI: payment card data. Never paste credit card numbers, expiration dates, security codes, or screenshots of payment forms into any AI tool, approved or not, because we handle card data under PCI DSS. Example: a customer emails a purchase order with their card number in it and asks for a rush quote. Remove the card details before asking Copilot to help draft your reply, and send payment info only through [approved payment process]. |
| 6-8 min | Other sensitive info and checking the output. Be careful with customer drawings, proprietary part specs, supplier pricing and employee information; use only approved tools and only what the task needs. Always check AI output yourself: if ChatGPT Enterprise/Team writes a PLC or CNC script, an engineer reviews and tests it before it touches a machine, and if Copilot drafts a customer quote, you verify every number. You're responsible for anything you send or ship, not the AI. |

8-10 min **Monitoring, mistakes and questions.** AI use on company devices is monitored, so treat it like any other work system. If you make a mistake, like pasting card data by accident, tell your manager and IT right away at [security contact email]; the first step is a conversation with your manager, and HR is involved only for repeated or serious cases. Questions go to Dana Whitfield, IT Director, and please complete your acknowledgment by [acknowledgment due date].

4. Six-month review (April 1, 2027)

- ☐ Acknowledgment and training completion rates by department and site, with follow-up on any team below [target percentage].
- ☐ Whether personal or free AI accounts and unapproved extensions are still in use on company devices, based on monitoring data, and whether those users now have access to the approved tools.
- ☐ Any incidents involving payment card data or other sensitive information in AI tools, how they were handled, and whether the PCI DSS-related rules need clearer examples.
- ☐ Requests received at ai-requests@example.com, decisions made, and whether vendor terms for Microsoft 365 Copilot and ChatGPT Enterprise/Team have been reconfirmed in writing for any changes.