

POLICY TEMPLATE • OCTOBER 2026

# AI use policy

A plain-English template for your business

## THE SHORT ANSWER

**A short policy staff will read. What AI they can use, what they can put in, what they must check, and who to tell when something goes wrong.**

**Written for business owners and managers, not lawyers.**

Eleven short sections, a one-page staff version and a signature page. Each section starts with a one-line summary. Fill in the square brackets, delete what you do not need, and roll it out.

## WHAT'S INSIDE

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| <b>1 Why we have this policy</b>      | Who it covers and what it is for                   |
| <b>2 Approved tools</b>               | What you can use, with which login                 |
| <b>3 What you can put into AI</b>     | Green, amber and red                               |
| <b>4 Check everything</b>             | AI makes things up                                 |
| <b>5 A person decides</b>             | What needs sign-off                                |
| <b>6-8 Information, honesty, code</b> | Client data, copyright, fakes, scripts and agents  |
| <b>9-11 Problems, roles, review</b>   | Who does what, and when it gets reviewed           |
| <b>Also</b>                           | The ten rules (staff version) and a signature page |

# How to use this template

Two minutes, then it is yours.

## IN SHORT

**Replace everything in [square brackets]. Delete what does not apply. Keep it short, because short policies get read and long ones get signed and ignored.**

- Fill in your company name, the owner of the policy and the approved tools.
- Cut any section that does not suit your business. A five-person firm does not need a committee.
- If you work in a regulated industry, or handle health, legal or financial information, have a lawyer read it before you roll it out.
- Give it to every staff member, and get a signature on the last page.

*This is a plain-English starting point from Commonsense Consulting. It is not legal advice.*

## 1. Why we have this policy

### IN SHORT

**AI saves time. It can also leak information and make things up. This policy says how [Company name] uses it.**

It applies to everyone who does work for [Company name]: employees, contractors and casuals. It covers any AI tool used for work, on any device, including your own phone.

We want you to use AI. We want you to use it without putting a client, a colleague or the business at risk.

## 2. Approved tools

### IN SHORT

**Use the tools on the list, with your work login. Anything else is not for work.**

| Tool                               | Approved for                                        | Account              |
|------------------------------------|-----------------------------------------------------|----------------------|
| [Microsoft 365 Copilot]            | [Email, documents, meetings, research]              | Work account only    |
| [Claude / ChatGPT / Gemini / Grok] | [Writing, analysis, coding. Delete if not approved] | [Business plan only] |
| [Add a row for each approved tool] |                                                     |                      |

- Personal accounts and free versions are not approved for work. They have no admin controls, and we cannot see where the data goes.
- Want a new tool? Ask [role / name] first. Do not sign up with the work email and sort it out later.
- AI features built into apps we already use are fine only if [role / name] has approved the app.

## 3. What you can put into AI

### IN SHORT

**Green is fine. Amber is fine in approved business tools, and only what the job needs. Red never goes into any AI tool.**

| Level | What it covers                                                                                                                                                                                        | The rule                                                                            |
|-------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|
| GREEN | Public information. General questions. Drafts with no client or personal details in them.                                                                                                             | Any approved tool.                                                                  |
| AMBER | Client names and work. Internal financials. Contracts and quotes. Staff information. Internal documents.                                                                                              | Approved business tools only, logged in with your work account. Only what you need. |
| RED   | Passwords, keys and access tokens. Credit card and bank details. Tax file numbers and ID documents. Health information. Anything we have promised a client or supplier we will not share with others. | Never. Not in any AI tool. Not even to "just check something".                      |

If you are not sure which colour it is, treat it as one level higher, then ask [role / name].

## 4. Check everything

### IN SHORT

**AI makes things up and sounds sure about it. You are responsible for what you send, sign or publish, whoever wrote the first draft.**

- Check facts, figures, names, dates, quotes and anything legal or technical.
- If the AI gives you a source, open it. Sources can be invented.
- Read the whole thing before you send it. Delete leftovers such as "Certainly! Here is your email."
- "The AI wrote it" is not an excuse. Your name is on it.

## 5. A person decides

### IN SHORT

**AI can help prepare. A person approves anything that leaves the business, and a person decides anything about another person.**

A person must read and approve:

- Anything sent to a client, supplier, regulator or the public.
- Quotes, contracts, invoices and financial figures.
- Anything published on our website or social media.
- Anything about a person, such as hiring, performance, pay or discipline. AI does not make those decisions.

## 6. Client and personal information

### IN SHORT

**Treat client and personal information the way you would anywhere else. AI is not a loophole.**

- Check the client contract before putting their information into any AI tool. Some contracts say no.
- Do not put personal information into AI unless it is an approved business tool and the job needs it. Personal information means names with contact details, health details, financial details and ID numbers.
- Privacy law applies to AI exactly as it applies to everything else.

## 7. Copyright, honesty and fakes

### IN SHORT

**Do not pass off other people's work as ours, do not hide AI where it matters, and do not fake anything of a real person.**

- Do not paste in someone else's work and ask the AI to rewrite it so it looks new.
- Check AI-written text and images before publishing. They can resemble existing work.
- If a client or regulator expects to know when AI was used, tell them.
- Do not use AI to fake a photo, voice, video, review or message from a real person. That includes jokes. Especially jokes.

## 8. Code, scripts and AI agents

### IN SHORT

**Read it before you run it. Give AI agents only the access they need.**

- Read and test AI-written scripts and code before running them on a live system.
- Never paste passwords, API keys, certificates or tenant secrets into an AI tool.
- AI agents that act on your computer or accounts, such as sending email, changing files or running commands, need approval from [role / name].
- An agent has the access you give it. Do not give it more than you would give a new starter.

## 9. When something goes wrong

### IN SHORT

**Tell [role / name] the same day. You will not be in trouble for telling us. You will be if you hide it.**

This covers pasting something you should not have, sending AI output with a mistake in it, or finding the AI showing information it should not.

- Stop using the tool for that task.
- Tell [role / name] what happened, what was involved and who might be affected.
- Keep the conversation or file. Do not delete it. We need to see it.

## 10. Who does what

### IN SHORT

**Everyone has a part. Managers set the example.**

| Who            | What they do                                                                          |
|----------------|---------------------------------------------------------------------------------------|
| Everyone       | Follows this policy, checks AI output, and reports problems the same day.             |
| Managers       | Make sure their team knows the rules, and do not allow shortcuts.                     |
| [Policy owner] | Approves tools, answers questions, keeps this policy up to date, and handles reports. |
| [IT provider]  | Manages licences, access, permissions and usage limits.                               |

Breaking this policy is handled through [Company name]'s usual conduct process.

## 11. Review

### IN SHORT

**We review this policy every 12 months, or when our tools change in a big way.**

|               |                 |
|---------------|-----------------|
| Policy owner  | [Name and role] |
| Version       | [1.0]           |
| Date approved | [Date]          |
| Next review   | [Date]          |

# The ten rules

The staff version. Print it. Stick it up.

|    |                                                                                                                  |
|----|------------------------------------------------------------------------------------------------------------------|
| 1  | <b>Use approved tools and your work login</b><br>No personal accounts, no free versions.                         |
| 2  | <b>Never paste the red stuff</b><br>Passwords, keys, card numbers, tax file numbers, health information.         |
| 3  | <b>Client information goes in approved business tools only</b><br>And only what the job needs.                   |
| 4  | <b>AI makes things up</b><br>Check the facts, the numbers and the sources.                                       |
| 5  | <b>Your name is on it, not the AI's</b><br>"The AI wrote it" is not an excuse.                                   |
| 6  | <b>A person approves anything going to a client or the public</b><br>Read it first. Delete the "Certainly!"      |
| 7  | <b>AI does not decide things about people</b><br>Hiring, pay, performance and discipline stay human.             |
| 8  | <b>Do not fake anything of a real person</b><br>No fake voices, photos, reviews or messages. Not even as a joke. |
| 9  | <b>Read scripts before you run them</b><br>And give AI agents the least access possible.                         |
| 10 | <b>Stuffed up? Say so the same day</b><br>Telling us is fine. Hiding it is not.                                  |

## Staff acknowledgement

I have read and understood the AI use policy for [Company name], and I agree to follow it.

|           |
|-----------|
| Name      |
| Role      |
| Signature |
| Date      |