AI document policy template for your team.

People are already using AI with work documents. A short, clear policy keeps that safe. Fill in the blanks below, review it with your leadership and legal team, and share it.

1 · PURPOSE

Why this policy exists.

Example wording you can adapt.

- [ ] We use AI to work faster with documents while protecting client, employee and company information.
- [ ] This policy applies to everyone who uses AI with [Company Name] documents.

2 · APPROVED TOOLS

Which AI tools are allowed.

Name them so nobody has to guess.

- [ ] Approved AI platforms: [list, e.g., ChatGPT, Claude].
- [ ] Approved apps that connect to AI: [list, e.g., RebelPDF Studio].
- [ ] Personal AI accounts may not be used for company documents.
- [ ] Ask [IT contact] before using any new AI tool.

3 · DOCUMENTS

What can and cannot go into AI.

Be specific. Examples help.

- [ ] Allowed: [e.g., public documents, internal drafts, marketing copy].
- [ ] Allowed after redaction: [e.g., contracts with names removed].
- [ ] Never allowed: [e.g., passwords, Social Security numbers, health or payment data].
- [ ] When unsure, ask [policy owner] first.

4 · SAFE HABITS

How to use AI with documents.

Simple rules for every user.

- [ ] Share only the part of a document you need help with.
- [ ] Redact private details before asking AI.

- [ ] Check every AI answer against the source page.
- [ ] Never paste AI output into a client document without review.

5 · OWNERSHIP

Who owns this policy.

Fill these in.

- [ ] Policy owner: [name, role].
- [ ] Last reviewed: [date]. Next review: [date].
- [ ] Report mistakes or concerns to: [contact].
- [ ] Questions: [email or channel].

This template is a starting point, not legal advice. Review it with your legal and compliance teams.