



COPILOT GENERAL USAGE POLICY

NUMBER: 107-004-200

EFFECTIVE DATE: June 16, 2026

DIVISION: Enterprise Information Services (State CIO)

POLICY OWNER: Privacy and Artificial Intelligence

INTERNAL OR STATEWIDE POLICY: Statewide

LAST REVIEWED DATE: June 16, 2026

SUPERSEDES: Updated Interim Guidance on Generative AI Access and Usage memo (Feb.10, 2026)

PAGE NUMBER: Page 1 of 4

REFERENCE/AUTHORITY:

- ORS 276A.203; 276A.206
- [Information Asset Classification Statewide Policy 107-004-050](#)
- [Copilot General Usage Statewide Procedure: 107-004-200_PR](#)

APPROVED SIGNATURE:

Terrence Woods, State Chief Information Officer

Statement

This policy outlines directives and best practices for the safe, effective use of Microsoft Copilot Chat, Microsoft 365 (M365) Copilot, and Teams Premium by state employees.

Applicability

This policy applies to all state agencies as defined in ORS 174.112, and includes any board, commission, department, office or other entity within the Oregon executive department. The following agencies are excluded:

- Secretary of State
- State Treasurer

Definitions

Artificial intelligence (AI): a machine-based system that is capable, for a given set of human-defined objectives, of making predictions, recommendations or decisions influencing real or virtual environments and uses machine- or human-based inputs.

Generative artificial intelligence (GenAI): a software system that generates new content, data, or other output, including images, video, audio, and text, autonomously. It uses algorithms and models to create new and original information from patterns and information it learned previously from a given set of data. Large language models and foundation models are both GenAI. GenAI is distinguished from other AI systems by its primary function of creating new content rather than solely classifying, predicting, or recommending from predefined categories.

Human in the loop (HITL): Human in the loop refers to a system or process in which a human actively participates in the operation, supervision and decision-making of an automated system. In the context of AI, HITL means that humans are involved in the AI workflow to ensure accuracy, safety, accountability and ethical decision-making.

Proprietary or protected material: material subject to ownership rights or legal restrictions on use, disclosure, reproduction, or distribution, including copyrighted works, licensed content, and trade secrets, as well as confidential or proprietary business information designated as restricted by the organization.

Public meeting: a convening of the governing body of a public body, for which a quorum is required, to make a decision or deliberate toward a decision on any matter, and that is open to the public. (ORS 192.610(5); ORS 192.630(1))

General Information

Copilot Chat, M365 Copilot and Teams Premium are generative AI tools from Microsoft, at least some of which are available to most state employees. This policy covers M365 Copilot, Copilot Chat, and Teams Premium, and provides full integration across Microsoft 365 applications like Word, Excel, PowerPoint, Outlook, and Teams to enhance productivity.

Copilot Chat (included with Microsoft 365 license): a conversational tool available to most state employees which is helpful with generating ideas, searching the web, or reviewing single documents.

M365 Copilot (additional license): an enhanced version of Copilot integrated across the M365 suite (including Word, Outlook, Excel, PowerPoint, and Teams) and which has direct access to employee data in Teams, Outlook, SharePoint, and OneDrive.

Teams Premium (additional license): an enhanced version of Teams that summarizes meetings, captures action items, and provides deep analysis on meetings when turned on.

Users of Copilot must follow two specific directives:

1. Appropriate data use: Only appropriate Level 1-2 data may be input into Copilot.
 - a. Data or information input into Copilot, either as a document attachment or directly entered text, must be properly classified. Users may not intentionally input content that is or would be classified as level 3 or 4 unless specific permission for their use case is received from Enterprise Information Services (EIS).
 - b. Use of proprietary or protected content, including licensed materials, subscription databases, and paid research, may only be used in accordance with the applicable license requirements.
2. Appropriate human review: Copilot outputs require human review, and AI should not take the place of human subject matter expertise. AI-generated content should be considered a “rough draft” and must receive sufficient human review before distribution or further action. The scope of the review should align with the nature of the content and its intended audience. Users may consult with their manager to determine the appropriate level of human review of Copilot outputs. In many cases, existing review processes will be sufficient, but it’s worth having the dialogue to confirm.

General User Responsibilities

- Review all Copilot output for accuracy and completeness. Users are responsible for the content of materials produced by Copilot that are subsequently used or distributed.
- Use only the enterprise-security approved versions¹ of Copilot Chat and M365 Copilot using their state credentials.
- Complete a state-provided AI training course through Workday before using M365 Copilot.²
- Classify any document used with Copilot in compliance with Statewide Policy 107-004-050³.

¹ Look for the green shield icon when logged into your Oregon account to confirm you are in a secure version of Copilot.

² The current approved course available in Workday is “DAS – EIS [Responsible AI for Public Professionals](#)”.

³ State of Oregon Information Asset Classification Policy [107-004-050.pdf](#)

- Copilot output should be reviewed and classified based on its content, beginning with the sensitivity level of the input data as a default starting point.
- Promptly report any anomalies (to M365.Info@das.oregon.gov and your own agency), such as:
 - Copilot generates language that is offensive, discriminatory, harmful, or otherwise unsuitable for workplace use.
 - Copilot appears to use or reference information the user did not provide or did not expect it to access.
- Never use Copilot output:
 - Without human review. Hitting send on an email or Teams chat containing AI output indicates that human review by the sender has occurred, and that the sender stands behind the content.
 - As the sole source of reference.
 - To impersonate individuals or organizations.
 - As the sole basis in making critical decisions or providing legal, medical, or financial advice.
 - In any way that violates laws, regulations, organizational policies, or contractual obligations.
- Users must not input proprietary, copyrighted or otherwise protected material into Copilot unless they have written authorization or licensing to use the materials with generative AI tools.
- Real-time transcription or translation of public meetings using Teams Premium requires written approval from your agency director or their designee. For public meetings requiring language translation, agencies should continue to use qualified human interpreters to ensure accuracy and compliance with legal requirements.

The agency director or their delegate should review the “Copilot Recommended Use Guidance” attachment to this policy. Agencies are encouraged to supplement it to provide clear direction to employees that supports the responsible use of Microsoft Copilot, including agency-specific standards for human review.