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Team AI Working Agreement

One page your team agrees, so everyone uses AI the same way.

Fill this in together. Keep the answers short and specific. Review it after your first reporting cycle and change what did not work. The examples are only a guide.

Organisation		**Team**	
Report or task		**Agreed on**	
Review date		**Version**	

What we agree	Our answer
1. Our AI tool Which AI tool we use for work, and how we sign in. ***Example:*** *The AI assistant in our work Microsoft account, signed in with our work account. No personal AI accounts for work.*	
2. Records AI may use The files AI may read for this report, and for which period. ***Example:*** *Last month's approved report, this month's source records and our current tracker. Current period only.*	
3. What never goes into AI Information that stays out of the AI tool, whatever the task. ***Example:*** *ID numbers, bank details, passwords, personal details of staff or customers, and anything marked confidential.*	
4. Decisions AI does not make Decisions that stay with people. ***Example:*** *Approvals, payments, eligibility, appointments, and anything said on behalf of our organisation.*	
5. Who checks The person who checks drafts against the records. ***Example:*** *The person who knows the records checks counts, dates and sources.*	

What we agree	Our answer
6. Who signs off The person who approves anything that leaves the team. ***Example:*** *The team lead approves everything that goes out.*	
7. When we need a second check Outputs important enough for a second reader. ***Example:*** *Anything for the board, a client, a regulator or the public.*	
8. Where the trail is kept Where we note which files, brief, checker and signer were used. ***Example:*** *A short note in the report's folder, saved with the approved version.*	
9. If something goes wrong What we do if AI gets something wrong or sensitive data went in. ***Example:*** *Tell the team lead the same day, correct the record and note what happened.*	

Agreed By

Name	Role	Signature and date
	Team lead	
	Checker	
	Team member	
	Team member	

This template guides how a team works with AI. It is not legal advice. Check it against your organisation's own policies on AI, information security and personal information (POPIA).

Capption AI Enablement helps teams use AI on a report they already prepare, with checks built in: capption.co.za/ai-enablement