Responsible use of M365 Copilot for NHS.net Connect

This guide provides an overview of M365 Copilot for NHS.net Connect, setting out clear guidelines and responsible practices to ensure the safe, secure and ethical use of M365 Copilot by all users.

By following these guardrails, you can maximise the benefits of M365 Copilot while maintaining integrity, privacy and compliance. It is important to understand what the capabilities of M365 Copilot so that you are aware of how to interact with it responsibly.

By reading this guide, you will learn:

- What M365 Copilot is and How it Works
- Advised Responsible Usage of M365 Copilot
- How to use M365 Copilot Securely with Confidential Matters
- M365 Copilot User Guides

What is M365 Copilot?

M365 Copilot is Microsoft's AI tool integrated into the Microsoft 365 suite, which includes apps like Word, Excel, PowerPoint, Outlook, and Teams. It helps boost productivity by assisting with tasks such as summarising documents, drafting emails, and creating presentations.

Think of it as a digital assistant, but far more intelligent and proactive. Unlike traditional AI, which relies on fixed commands, M365 Copilot uses generative AI to offer dynamic, tailored support based on your needs. This allows you to focus on more valuable tasks. M365 Copilot integrates seamlessly into your daily tasks.

With M365 Copilot, you can:

- Summarise lengthy documents and reports
- Create detailed presentations quickly
- Automate repetitive tasks like email drafting and meeting scheduling
- Get proactive suggestions while working in familiar apps

The M365 Copilot features that are available for NHS.net Connect use are:

1. **Assist** – Functions used in Copilot, Teams and Outlook to:

    - Assist users throughout your day, helping to keep them updated on the status of their team, work, and schedule.

    - Prioritising events based on the role, past attendance, and agenda.

2. **Ideate** – Functions used in Word, Outlook and PowerPoint to:

- Generate new ideas and solutions.

- Create an initial draft in PowerPoint, Word Doc and Outlook.

- Gain guidance on grammar, stylistic approach, and tonality.

3. **Evaluate** – Functions used in Word and Excel to:

- Evaluate existing materials to ensure users have met their objectives and have clearly articulated intent.

- Create charts, tables and dashboards based on input and analyse data and generate insights

4. **Transcribe** – Functions used in Teams and Outlook to:

- Transcribe meetings, automatically offering updates on what users may have missed, outlining key meeting notes, and recording any action items that were assigned.

- Capture information accurately from discussions or data inputs.

5. **Summarise –** Functions used in Teams, Outlook, Word and PowerPoint to:

- Summarise documents, email chains, and Teams meetings to prepare users and their team members for future collaboration.

- List out key points and action items from in-progress meeting.

The quality and relevance of the results provided by M365 Copilot may vary depending on the content and quality of your data. There is also a risk of unintentional exposure of sensitive information with the integration of AI, and potential harmful output that could be offensive or discriminatory.

Responsible Usage of M365 Copilot

While M365 Copilot can generate powerful responses, analytics and insights, it is important to note that M365 Copilot does have certain limitations and therefore must be treated with care to prevent any harmful effects.

There are three main limitations of M365 Copilot and AI-powered content generation to be aware of: Model Hallucinations, Prone to Bias and "Black Box" Thinking, all of which are explained below.

Model Hallucinations

Model hallucinations occur when AI generates information that is nonsensical, inaccurate or not based on its training data. This can occur due to various factors, including overfitting, biases or inaccuracies in the training data, and high model complexity.

What you need to be aware of:

Hallucinations can lead to the spread of misinformation, incorrect decision-making, and potentially harmful outcomes, especially in sensitive areas like healthcare. You need to be critical of M365 Copilot's outputs, verify information from trusted sources and not rely solely on M365 Copilot for decision-making.

Prone to Bias

Bias refers to the tendency of AI systems to produce outputs that reflect the unfair preferences or prejudices existing in the training data. This can lead to discriminatory outcomes, such as perpetuating stereotypes or underrepresenting certain groups.

What you need to be aware of:

AI systems often learn from data that may contain biases. These biases can be encoded in algorithms, leading to discriminatory practices and inequality in healthcare. Thus, the outputs from M365 Copilot always need to be treated carefully in each step.

"Black Box" Thinking

"Black Box" thinking refers to the situation where the decision-making process of an AI system is not transparent or understandable to users or developers. These AI models, often based on complex algorithms, can make predictions or decisions without explaining how they arrived at those conclusions.

What you need to be aware of:

Without transparency, it's challenging to identify and correct biases that may exist within AI systems. This inability to scrutinize the decision-making process of AI can lead to ethical and legal challenges.

Important Note: As with any tool, please use M365 Copilot with caution and adhere to NHS.net Connect guidelines to comply with data privacy laws, as well as relevant confidentiality and information security policies to protect NHS.net Connect, patient and organisation data against inadvertent leakage or misuse.

Confidential & Secure Usage of Copilot for M365

M365 Copilot is a powerful productivity and collaboration tool, but it is not suitable for assessing or analysing complex matters, sentiment, or people's behaviour. You need to apply necessary judgement and if necessary, intervention to the outputs, rather than accepting all contents generated by M365 Copilot without review.

> **Important Note:**
>
> **Do not use M365 Copilot in clinical scenarios.**
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> Users performing clinical tasks must carefully consider the risks associated with utilising M365 Copilot in their environment. The initial phase of the M365 Copilot pilot is focused on administrative and business support tasks, not clinical use. Therefore, you should not accept a Copilot licence unless you commit to not using Copilot-generated outputs to inform or guide clinical decisions.

Advised Responsible Usage

- **Take care with confidential or sensitive information when using M365 Copilot:** Although M365 Copilot only accesses information you have permission to view within your files and conversations, the content it suggests is based on this accessible information. Including sensitive details may result in them appearing in the generated content it provides based on your prompts, which could increase the risk of data breaches and potential legal consequences.

- **Be cautious using M365 Copilot in meetings with sensitive topics:** We advise against using M365 Copilot in discussions involving someone's sensitive personal information (e.g., health or disability details, political beliefs, etc.). This helps minimise the risk of those who may have access to these discussions accidentally or intentionally exposing private details captured by M365 Copilot. In these situations, human judgment is essential, and relying on M365 Copilot's suggestions could lead to confirmation bias. Therefore, it's best to be cautious with M365 Copilot in scenarios, for example:
    - Corporate investigations or legal matters: These situations often require human discretion and confidentiality.
    - HR-Related processes or procedures: Sensitive HR discussions, such as performance evaluations, disciplinary actions, or interviews, require careful handling.

- **Accuracy and bias**: Please review all outputs (you are the 'human-in-the-loop') for inaccuracies, bias, confidential information or offensive content. This is to avoid 'AI hallucinations' which is a term to describe when M365 Copilot generates incorrect or misleading information. Always ask M365 Copilot to cite the source, review the generated content for any potential inaccuracies and discard or revise any problematic statements.

- **Meeting recording and transcription:** When enabling M365 Copilot in a Teams meeting, it's a good practice to inform participants (verbally or via the meeting chat) and allow them to opt out if needed. Transparency builds trust and avoids misunderstandings that could upset colleagues inside or outside the organisation.

- **Be mindful of permissions and sensitivity labels:** It's important to check that you have the appropriate rights to use specific data and that the correct people have access to the right information. Proper management of permissions helps prevent data breaches or mishandling of sensitive information.

How to Prompt Effectively

- **Keep tasks simple when prompting:** Apply good judgment and avoid using M365 Copilot to evaluate the behaviour or performance of an individual or group or identify sentiment and/or emotions.

- **Ethical use**: It is advisable to avoid querying about illegal matters, requesting edits or images of others, or asking for outputs that are 'based on' or 'in the style' of a specific author or third party. This helps to ensure compliance with legal and ethical guidelines.

- **Avoid uploading or sharing confidential or sensitive information with M365 Copilot:** Although M365 Copilot only accesses information you have permission to view within your files and conversations, the content it suggests is based on this accessible information. Including sensitive details may result in them appearing in the generated content it provides based on your prompts, which could increase the risk of data breaches and potential legal consequences. This includes:
    - Confidential data: Avoid sharing any confidential or sensitive information, including Protected Health Information (PHI) and Personally Identifiable Information (PII).
    - Personal data: Ensure personal data on NHS.net Connect is within the bounds of acceptable use found in the NHS.net Connect Acceptable Use Policy (https://portal.nhs.net/Home/AcceptablePolicy), as it may be used in responses generated by M365 Copilot.
    - Content protection: Apply protections such as permissions and sensitivity labels to all sensitive content.

- **Permissions for data use:** Ensure you have the rights to use the data generated by M365 Copilot. For example, copyrighted material may be returned.

- **Provide feedback:** Regularly provide feedback to M365 Copilot to improve and refine your experience, ensuring no confidential or sensitive information is inputted as part of your response.

Best Practice Suggestions

- **Avoid unreliable output.** AI hallucinations can occur when M365 Copilot observes a pattern or object that doesn't exist. Always ask M365 Copilot to cite the source and review the outputs for potential inaccuracies.

- **Avoid biased output.** M365 Copilot can produce biased output that excludes certain gender, race, disability or other groups due to the original data it gets trained from. Perform due diligence on the output from M365 Copilot to prevent bias.

- **Human oversight:**
    - Review all generated outputs for biased, proprietary, or confidential information, personal data and recognizable brands or branded products.
    - Look out for problematic content, including offensive statements.
    - Important context may be lost if M365 Copilot is solely used to summarise without human oversight, always review generated material and involve your expertise and judgement.
    - Revise the content before using it or discard it.
    - Final decisions should always involve your expertise and judgement to ensure they are well-informed.

- **Transparency:** Label all M365 Copilot-generated content (e.g. with a sentence, icon or watermark) and include a disclaimer notifying the recipients that the content requires human review before use as it may be inaccurate, unreliable or offensive.

- **Purposeful work:** It is advised that you use generated content by M365 Copilot only for work-related purposes. Additionally, do not use any output relating to a person for any purpose which could have a legal or material impact on the individual.

- **Disclaimer.** Add a disclaimer that AI generated content may be inaccurate, unreliable or offensive, and human review and discretion is needed before use.

- **Maintain sensitivity labels when creating content.** Apply protections such as permissions and sensitivity labels to all sensitive content.

M365 Copilot User Guides

To learn more about M365 Copilot, please refer to the training materials linked below for comprehensive guidance, recommended actions, and best practices:

- [Getting Started Use Cases for M365 Copilot](#)
- [Getting Started with Labelling](#)
- [Getting Started with Access & Permissions Review](#)
- [Getting Started with Prompting](#)
- [Getting Started with Copilot in Microsoft Teams](#)
- [Getting Started with Copilot in Outlook](#)
- [Getting Started with Copilot in Word](#)
- [Getting Started with Copilot in PowerPoint](#)
- [Getting Started with Copilot in Excel](#)
- [Getting Started with Copilot in OneNote](#)
- [Getting Started with Copilot in Whiteboard](#)
- [Getting Started with Copilot in Edge](#)
- Getting Started with Prompt Buddy (coming soon)

Important note:

If M365 Copilot accesses data you should not have access to or you believe it is being used in an inappropriate manner, immediately contact your organisation's pilot representative and inform them of the situation. Your organisation will then raise this with the NHS.net Connect team as appropriate.