

State of North Carolina Copilot for Microsoft 365 Policy

Statewide IT Policy

Version 1.1

February 26, 2025



Document Information

Revision History

Date	Version	New or Revised Requirement	Description	Author
Dec 5, 2024	1.0	New	Policy Published	Chris Brittingham
Feb 26, 2025	1.1	Updated	<ul style="list-style-type: none"> Expanded on pilot recommendations Removed PTA requirements Added AUP to user requirements 	Chris Brittingham

Document Details

Department Name	NCDIT Enterprise Collaboration Services
Owner	NCDIT Enterprise Collaboration Services
Title	Copilot for Microsoft 365 Policy
Publication Date	February 26, 2025
Next Release	August 25, 2025
Document Type	PDF
Document Number	1
Version	1.1

Table of Contents

Document Information	2
Revision History	2
Document Details	2
Purpose	4
Content Lead	4
Scope	4
Policy Requirements	4
Requirements to Activate Copilot for Microsoft 365	4
Microsoft 365 Tenant Requirements for Copilot for Microsoft 365 Use	4
Agency Requirements for Copilot for Microsoft 365 Use	4
User Requirements for Copilot for Microsoft 365 Use.....	5
Regulations and Applicable Laws	5
Enforcement	5
Policy Review Cycle	5

Purpose

The purpose of this policy is to establish requirements for the activation, use, monitoring, and review of Copilot for Microsoft 365 within state agencies. This policy aims to ensure that the deployment and utilization of Copilot for Microsoft 365 aligns with state regulations, enhances productivity, and maintains data governance and compliance.

Content Lead

N.C. Department of Information Technology - Enterprise Collaboration Services

Scope

The requirements summarized in this policy apply to agency leadership, agency security liaisons, agency privacy points of contact, and selected users within state agencies who utilize Copilot for Microsoft 365 within the state of NC.

Policy Requirements

Requirements to Activate Copilot for Microsoft 365

- Agency CIOs should ensure all necessary internal approvals are completed prior to implementation of Copilot for Microsoft 365 (e.g., General Counsel, Finance, Operations, etc).
- Agencies are recommended to complete a pilot of Copilot for Microsoft 365 with select users to train on and implement operational procedures for Copilot for Microsoft 365.
 - Recommended pilot window is until June 30, 2025.
 - Selected users must complete Copilot for Microsoft 365 training prior to the pilot.
 - Once the pilot has been completed, agency will move to a planned deployment of Copilot for Microsoft 365.
 - Security liaisons and privacy points of contact must be aware of the deployment timeline.
- Agencies must procure the necessary Copilot for Microsoft 365 license through the purchase requisition process.
 - Agency CIOs are required to request licenses for Copilot for Microsoft 365 users within their agency.
- NCDIT can offer an adoption framework for agencies to follow, if requested.

Microsoft 365 Tenant Requirements for Copilot for Microsoft 365 Use

The Microsoft 365 Tenant Services Team is required to perform the following tasks when using Copilot for Microsoft 365. For agencies within the NCDIT Microsoft 365 tenant, these actions are performed by NCDIT.

- Tenant must designate Copilot for Microsoft 365 agency administrators to enable Copilot for Microsoft 365 for agencies within the tenant.

Agency Requirements for Copilot for Microsoft 365 Use

Agency is required to perform the following actions when using Copilot for Microsoft 365.

- Agency must assess and manage access, permissions, and roles for any user with a Copilot for Microsoft 365 license to control who can access specific data and services within the Microsoft 365 suite to prevent oversharing sensitive information. Data access should be limited to *need to know*.

- Agency must adhere to state and industry-specific policies, standards, regulations, and frameworks and configure Microsoft 365 to meet security, privacy, and AI compliance requirements and all relevant agency specific policies (e.g., [North Carolina State Government Responsible Use of Artificial Intelligence Framework](#); [Fair Information Practice Principles](#), [Statewide Information Security Policies](#), [Statewide Data Classification and Handling Policy](#)).

User Requirements for Copilot for Microsoft 365 Use

- Users must adhere to all guidance within the [Statewide Acceptable Use Policy](#), at a minimum.
- Users must complete any state or agency required Copilot for Microsoft 365 training.
 - NCDIT and the agency have the authority to mandate Copilot for Microsoft 365 specific training.

Regulations and Applicable Laws

The following reference sections in the N.C. General Statutes provide additional information with respect to compliance with state law:

- N.C.G.S.143B-1320(a)(17) – Definitions; scope; exemptions
- N.C.G.S. 143B-1321 – Powers and Duties of the Department
- N.C.G.S. 143B-1322 – State CIO Duties
- N.C.G.S. 143B-1325 – State information technology consolidated under the Department of Information Technology
- N.C.G.S. 143B-1350(a) – Procurement of information technology
- N.C.G.S. 143B-1370(a) – Communications services
- 09 NCAC 06b.0701 – Contracts Established by DIT

Enforcement

Violations of this policy, or failure to implement provisions of this policy, may result in revocation of agency or user Copilot for Microsoft 365 license(s) by the state CIO.

Policy Review Cycle

The Copilot for Microsoft 365 Policy will undergo a periodic review at semi-annual intervals, or as changes are required. Updates to the policy will be determined based upon the nature of the policy and requirements driven by need. Any identified changes, or outdated information within the policy will be addressed promptly. This may involve revisions, additions, or removals as needed to ensure that policies remain current and relevant.

The following roles provide leadership and management over this policy in accordance with the NCDIT Policy Management Policy:

- Secretary of the N.C. Department of Information Technology and State Chief Information Officer has approval authority.
- Chief Deputy State Chief Information Officer (or delegate) has policy management responsibilities.