AI POLICY & STAFF TRAINING · HANDOFF PACK

Clear AI rules your whole team follows.

Built for Parkside Accounting. An AI Use Policy written for how your team works, a 15-minute training, a poster for the office, and an approved-tools list.

01 Your setup at a glance
02 Your AI rules
03 Test report: Staff quiz and sign-off
04 Ownership & access
05 30-day results
06 Keeping it current

Parkside Accounting

Prepared by Open Arm Solutions · Delivered October 2026

SAMPLE

01 · YOUR SETUP AT A GLANCE

Your AI policy is signed and in use across 4 tools.

An AI Use Policy written for how your team works, a 15-minute training, a poster for the office, and an approved-tools list.

9	9 of 9	90%	4
Staff trained	Policy signed	Average quiz score	Approved AI tools

Where it's set up

TOOL	WHO USES IT	WHAT IT DOES	STATUS	LAST UPDATED
ChatGPT (Team plan)	Office team	Drafts, emails and policy questions; client data kept out	Live	Nov 3, 2026
Website chat	Visitors	Questions and booking; says it's automated	Live	Nov 3, 2026
Phone answering	Callers	Missed calls and messages; offers a person on request	Live	Nov 3, 2026
Microsoft Copilot	Owner	Summarizing long emails and software documents	Live	Nov 3, 2026

AI use policy last updated Nov 3, 2026.

How it works

01 **Set your rules** — What never goes into AI

→ 02 **Train the team** — 15 minutes, read or listen

→ 03 **Quiz and sign** — The tracker shows who signed

→ 04 **Poster in sight** — Never-paste rules where people work

→ 05 **Log any slip** — Report it the same day

Start using it today

1. Check before you paste

Look for names, ID numbers and account numbers.

2. Add a tool to the approved list

Send us the tool's name and what it's for.

3. Onboard a new hire

Play the 15-minute training.

02 · YOUR AI RULES

The rules, written for how your team works.

Each rule says what it means, how we explain it to staff, and when to ask a manager first.

Never put these into any AI tool

THE RULE

Tax ID numbers, bank and card numbers, client tax forms, passwords, staff pay or medical details.

HOW WE EXPLAIN IT TO STAFF

> *"If it's on a tax form, it doesn't go into AI. Use 'the client', not names or numbers."*

ASK A MANAGER FIRST WHEN

You're not sure whether something counts as private.

NEVER SAY

That pasting a client's tax ID number or tax form is fine, even once.

Approved tools only

THE RULE

Use only the four tools on the approved list. Personal accounts and free apps are not approved for office or client information.

HOW WE EXPLAIN IT TO STAFF

> *"Office work goes in office tools. If a new app looks useful, ask and we'll check it before anyone uses it."*

ASK A MANAGER FIRST WHEN

You want to try a new AI app or browser extension.

NEVER SAY

That a personal AI app is fine for client work.

Also inside: Money needs a person, Tell clients when it's AI, If something goes wrong, Check before you send.

Your team took the quiz and signed the policy.

The quiz follows the 15-minute training. 9 staff took the 10-question quiz; the average first-try score was 90%. The 2 questions most of the team missed (what never goes in and approved tools) are covered again in the walkthrough video.

9
Staff who took the quiz

90%
Average first-try score

2
Questions most missed

9 of 9
Policy signed

QUIZ QUESTION	ANSWER (HOW MANY GOT IT RIGHT)	POLICY SECTION	TEAM RESULT
Can you use a client's name and income in a draft?	Use 'the client'; add details after, outside the AI tool. (6 of 9 right; covered again in the walkthrough video)	Section 2	Missed
Who adds a tool to the approved list?	The owner, after a check. (5 of 9 right; covered again in the walkthrough video)	Section 3	Missed
Can you paste a client's Social Security number into ChatGPT?	No. It stays in the tax software. (9 of 9 right)	Section 2	Known
Is it OK to paste a bank account number to check a payment email?	Never. (9 of 9 right)	Section 2	Known
Can you use your personal ChatGPT for a client email?	No, only the Team plan. (8 of 9 right)	Section 3	Known
A free AI app on your phone reads receipts. Can bookkeepers use it?	Not until it's on the approved list. (8 of 9 right)	Section 3	Known

Showing 6 of 10, misses first. Every row is in your test report and your portal.

Results by topic


What never goes in
2/3
Approved tools
2/3
Money & approvals
2/2
Mistakes & reporting
2/2

03 · SIGN-OFF TRACKER

9 of 9 people have signed the policy.

Quiz scores are from the first try. New hires are added here as they start, and the portal keeps it current.

NAME	ROLE	QUIZ SCORE	POLICY SIGNED
Ellen P.	Owner	10/10	Signed Sep 30
Luis R.	Office manager	10/10	Signed Sep 30
Priya S.	Tax preparer	9/10	Signed Sep 30
Marcus T.	Tax preparer	9/10	Signed Oct 1
Kevin O.	Bookkeeper	9/10	Signed Oct 1
Aaron B.	Bookkeeper	8/10	Signed Oct 1
Jess W.	Front desk	9/10	Signed Oct 2
Tom H.	Payroll	9/10	Signed Oct 2
Sam K.	New hire (started Oct 20)	8/10	Signed Oct 22

More test results

QUIZ QUESTION	ANSWER (HOW MANY GOT IT RIGHT)	POLICY SECTION	TEAM RESULT
Can the website chat approve a $75 fee discount?	No: over $50 goes to the office manager. (9 of 9 right)	Section 4	Known
Who sends a refund a client asked the chat for?	The office manager. (9 of 9 right)	Section 4	Known
You pasted something you shouldn't have. What now?	Tell the office manager the same day; nobody is blamed for reporting. (9 of 9 right)	Section 5	Known
Must the website chat say it's automated?	Yes, and offer a person on request. (9 of 9 right)	Section 6	Known

Passing: 8 of 10 or better, and all 9 staff passed on the first try. Each question shows how many of the 9 got it right first time; the two most missed are covered again in the walkthrough video.

04 · OWNERSHIP & ACCESS

Your accounts and files are yours: each one, who owns it, and where it lives.

Every account is in your name. We have helper access only, and you can remove it any time without breaking anything.

WHAT	ACCOUNT OWNER	OUR ACCESS	WHERE TO FIND IT
AI Use Policy master file	Parkside (Google Drive)	Editor, removable	Drive › Parkside AI › Policy
Signed policies	Parkside	None	Office binder and Drive › Signed
Training (written and audio)	Parkside	None	Portal › Files
Poster files (print-ready)	Parkside	None	Portal › Files
Approved-tools list	Parkside (Google Drive)	Editor, removable	Drive › Parkside AI › Tools
ChatGPT Team workspace	Parkside, owner is admin	None	ChatGPT › Workspace settings

Every file we handed over

FILE	FORMAT	WHERE IT IS
AI Use Policy, signed copies	PDF + Word	Drive › Signed
Training (written and audio)	PDF + MP3	Portal › Files
Poster	PDF	Portal › Files

Also yours: the handoff pack, the test report, this sheet and the 30-day results report, each as a PDF and an editable Word file, in your portal.

If you ever leave

Everything keeps working. Remove our access where it says "removable". We delete our working copies 30 days after your plan ends.

Who to contact

hello@openarmsolutions.com or text (954) 821-2598. We usually reply the same business day.

05 · 30-DAY RESULTS

Your first month with the AI policy.

Illustrative numbers for a sample business. Your real report is built from your own logs 30 days after launch.

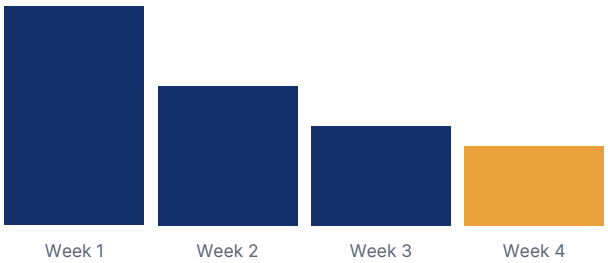
27
Policy questions asked

2
Near-misses reported & fixed

0
Client data found in a spot check

9 of 9
Staff signed

Policy questions per week



Most asked

Can I paste a client's name?	6
Is this app approved?	5
Can AI draft a client email?	4
Photos of receipts	4

What we changed & next month's plan

Added
Receipt photos: allowed in the approved receipt app only.

Updated
Approved list: the receipt app the bookkeepers asked about, after a check.

Next
A 5-minute refresher at the December team meeting.

06 · KEEPING IT CURRENT

When something changes, it changes everywhere.

When prices, hours, services or policies change, these three steps keep every answer right.

MONTHLY MANAGEMENT

Active · renews Dec 2

Price and policy updates, fixes, and a monthly check with a short report. Text or email any change.

To request a change

1. **Text or email us** at (954) 821-2598 or hello@openarmsolutions.com: what changed and from when.
2. **We update it once** and every tool gets the new answer. On Monthly Management, small changes are included.
3. **We confirm** by reply, with the updated policy and poster.

How-to guides

Check before you paste · 1 min

1. Look for names, ID numbers and account numbers. 2. Replace them with 'the client'. 3. Unsure? Ask the office manager first.

Add a tool to the approved list · 2 min

1. Send us the tool's name and what it's for. 2. We check its data terms within 2 business days. 3. The list and the poster are updated.

Onboard a new hire · 2 min

1. Play the 15-minute training. 2. Give the quiz. 3. Get the policy signed and log it in the tracker.

Where things stand

STEP	DETAIL	STATUS
Setup questionnaire	Received Sep 24	Done
Policy written for your business	Tested before handoff	Done
Training and walkthrough	Live Oct 2	Done
30-day results report	Sent Nov 3	Done