Part 1: AI policy acknowledgement

[Firm name]: AI policy acknowledgement.

I confirm that:

- I have read [Firm name]'s AI policy, version [number], dated [date].

- I understand which AI tools and plans are approved for client work, and that I must not put client or colleague personal data into any other AI tool, including personal accounts.

- I will leave out personal details a task doesn't need, and take extra care with health information and other sensitive details.

- I will check AI output, including facts, figures and any citations, before relying on it or sending it to a client.

- I will tell [name or role] straight away if I think personal data has gone into an AI tool it shouldn't have, so the firm can decide what to do.

- I know who to ask if I'm unsure: [name or role].

Name: [name]. Role: [role]. Signed: [signature]. Date: [date].

Part 2: AI training log

[Firm name]: AI training log. Owner: [name, role]. Last reviewed: [date].

Columns:

- Name and role.

- Policy version read, and the date they signed the acknowledgement.

- Training completed, for example the AI training quiz, a team session or a course.

- Date completed, and the result where there is one.

- Evidence kept, for example the signed acknowledgement or a printed quiz result.

- Refresh due: the date to repeat it, for example a year on, or sooner if the policy or approved tools change.

Example rows (made-up example)

Made-up example, not a real firm.

- Priya Shah, trainee accountant | Policy v2, signed 6 Oct 2026 | AI training quiz | 6 Oct 2026, 8 of 8 | Signed form and printed result in HR file | Oct 2027

- Tom Ellis, partner | Policy v2, signed 9 Oct 2026 | AI training quiz and team session | 9 Oct 2026, 7 of 8 | Signed form, session attendance list | Oct 2027

- New starter, admin | Policy v2, [date] | To do in first week | [date] | [evidence] | [date]

Fill in the parts in [square brackets]. General information, not legal advice.