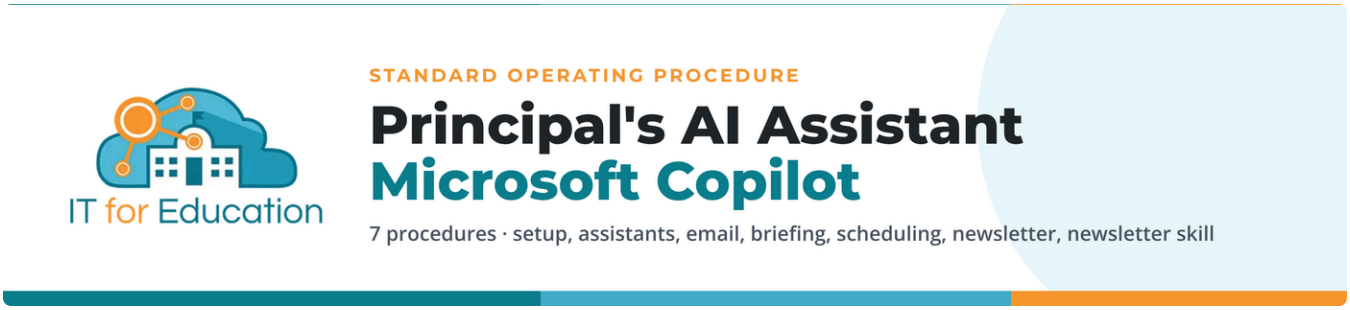


SOP: Principal's AI Assistant — Microsoft Copilot

Nov 11, 2026 · @Carlos · IT for Education · Version 1.1

> **Before you use this guide:** it is shared free, for information only, and your school remains responsible for following all laws and policies that apply to it and for reviewing every AI output. Read the **Disclaimer and terms of use** at the end.

Before you start

These seven procedures set up Microsoft Copilot as a principal's assistant for email, scheduling and the weekly newsletter, using what a Microsoft 365 Education school already has.

Who it's for: principals, assistant principals and office managers. Steps marked **(Admin)** are done by the school's Microsoft 365 admin or IT provider.

Pick a procedure

SOP	What it fixes	Level	Data level
1	Getting the school account ready	Start	None
2	Saved assistants for parent emails and polishing your writing	Build	Yellow
3	Summaries and drafts inside Outlook, Teams and OneDrive	Start	Yellow
4	The morning inbox scramble: briefing plus draft replies	Automate	Yellow

SOP	What it fixes	Level	Data level
5	Walkthrough rotations, the Monday bulletin, meeting times	Build	Yellow
6	The Friday newsletter, built from items collected all week	Build	Green
7	The same newsletter, using our ready-made skill	Build	Green

Start = use AI by hand. **Build** = save an assistant you reuse. **Automate** = it runs on a schedule. Data levels match the safety rules table below.

What you need

- A school Microsoft 365 account (your @school email) with an A1, A3 or A5 license
- 15 minutes for setup, then 2–5 minutes a day

Free vs. paid Copilot

	Copilot Chat (free with A1/A3/A5)	Microsoft 365 Copilot (paid add-on, about $18 per user per month for education)
Secure chat, file upload, web answers	Yes	Yes
Build simple agents	Yes	Yes
Reads your mailbox, calendar and files on its own	Limited; varies by tenant	Yes
Copilot inside Word, Outlook, Teams	Basic features	Full

Safety rules: what can go into AI

Green: go ahead	Yellow: school account only	Red: never
Newsletters, public school news	Internal staff memos	Student names with grades, discipline or health
Lesson ideas, pacing, rubrics	Parent emails, read through your connected school account	IEP, 504 or counseling details

Green: go ahead	Yellow: school account only	Red: never
Polishing your own writing	Schedules and calendars	Custody, family finances, tuition aid
Agendas and templates	De-identified data	Passwords or ID numbers

Always sign in with your **school** account (look for the green shield or "Protected" label), never a personal Microsoft account. You review every draft before anything is sent.

Presentation walkthrough: your morning briefing in 4 steps

This is the conference demo, step by step: connect your apps, draft replies, use several apps in one request, then run it every weekday at 7:00 a.m. Each step points to the full SOP below.

Step 1: Connect your apps

Copilot is built into Outlook, Teams and OneDrive, so there is nothing to connect. Reading your mailbox and calendar from Copilot Chat needs a **Microsoft 365 Copilot** license; free Copilot Chat works inside Outlook only. Full details: SOP 3.

Step 2: Generate email drafts

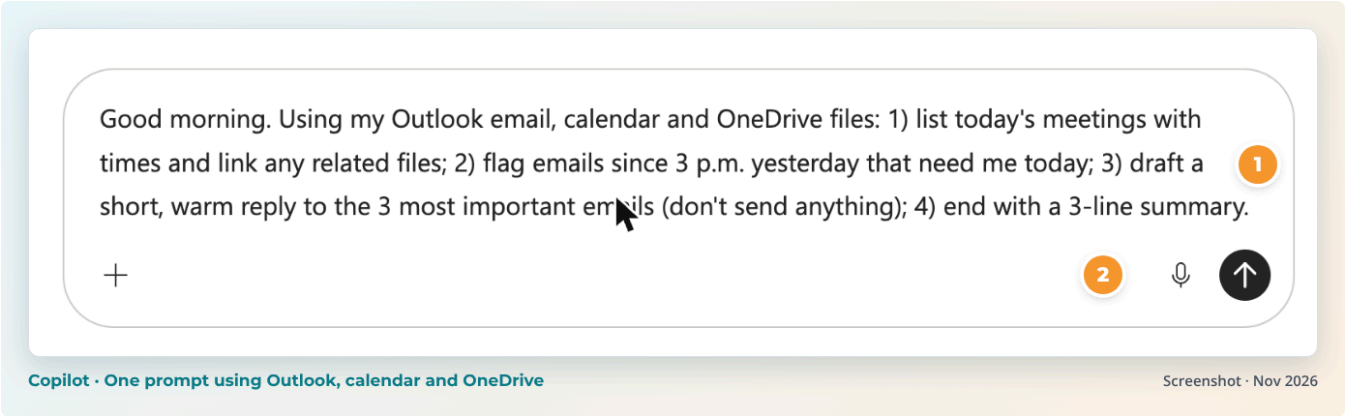
In Outlook, open an email that needs a reply, click the **Copilot** icon (*Draft with Copilot*), and type what the reply should say. Review and edit it; the draft stays in Outlook until you send it. With a paid license you can also ask Copilot Chat:

```
Look at my unread emails from the last 24 hours. For each email that needs a reply from me, draft a short, warm, professional reply. Do not send anything.
```

Step 3: One prompt, several apps

This single request uses Outlook email, calendar and OneDrive together (paid license):

```
Good morning. Using my email, calendar and files:
1) List today's meetings with times and link any related files.
2) Flag emails since 3 p.m. yesterday that need me today.
3) Draft a short, warm reply to the 3 most important emails. Don't send anything.
4) End with a 3-line summary I can read in 30 seconds.
```



Copilot · One prompt using Outlook, calendar and OneDrive

Screenshot · Nov 2026

Step 4: Run it every weekday at 7:00 a.m.

- **If you see it:** hover over the prompt you sent and choose **Schedule this prompt**, then set weekdays at 7:00 a.m. This needs a Microsoft 365 Copilot license, and your admin must allow it. It did not appear on the account we tested in November 2026.
- **Otherwise:** build a **Plan My Day** agent with the Step 3 prompt (SOP 4) and open it each morning, or ask IT for Education to set up a Power Automate flow that emails you the briefing at 7:00 a.m.

Remember: AI drafts, you decide. Nothing is sent without you.

SOP 1: Set up the education account

Copilot Chat is free for staff with a Microsoft 365 A1, A3 or A5 license when they sign in with their school account, so most schools only need to confirm access.

Admin steps (IT provider or Microsoft 365 admin)

1. Sign in to **admin.microsoft.com** with an admin account.
2. Confirm staff have an **A1, A3 or A5** license (**Billing → Licenses**).
3. Go to **Copilot → Settings** and confirm Copilot Chat is available to staff, and pinned in the Microsoft 365 app, Teams and Outlook.
4. Under **Agents**, decide whether staff can create and share agents (needed for SOP 2). If agents use pay-as-you-go features, set up billing first or keep to free features.
5. Optional: buy **Microsoft 365 Copilot** licenses for the principal and office manager if you want Copilot to read mail and calendar automatically.
6. Keep Copilot Chat off for student accounts unless your policy says otherwise.

Principal steps

1. Go to **m365.cloud.microsoft/chat** (or open the Microsoft 365 Copilot app).

2. Sign in with your **school** email.
3. Check for the shield or "Protected" label, which means enterprise data protection is on.
4. Type *Hello* to confirm it answers.

Done when: Copilot Chat answers and shows the protected label under your school account.

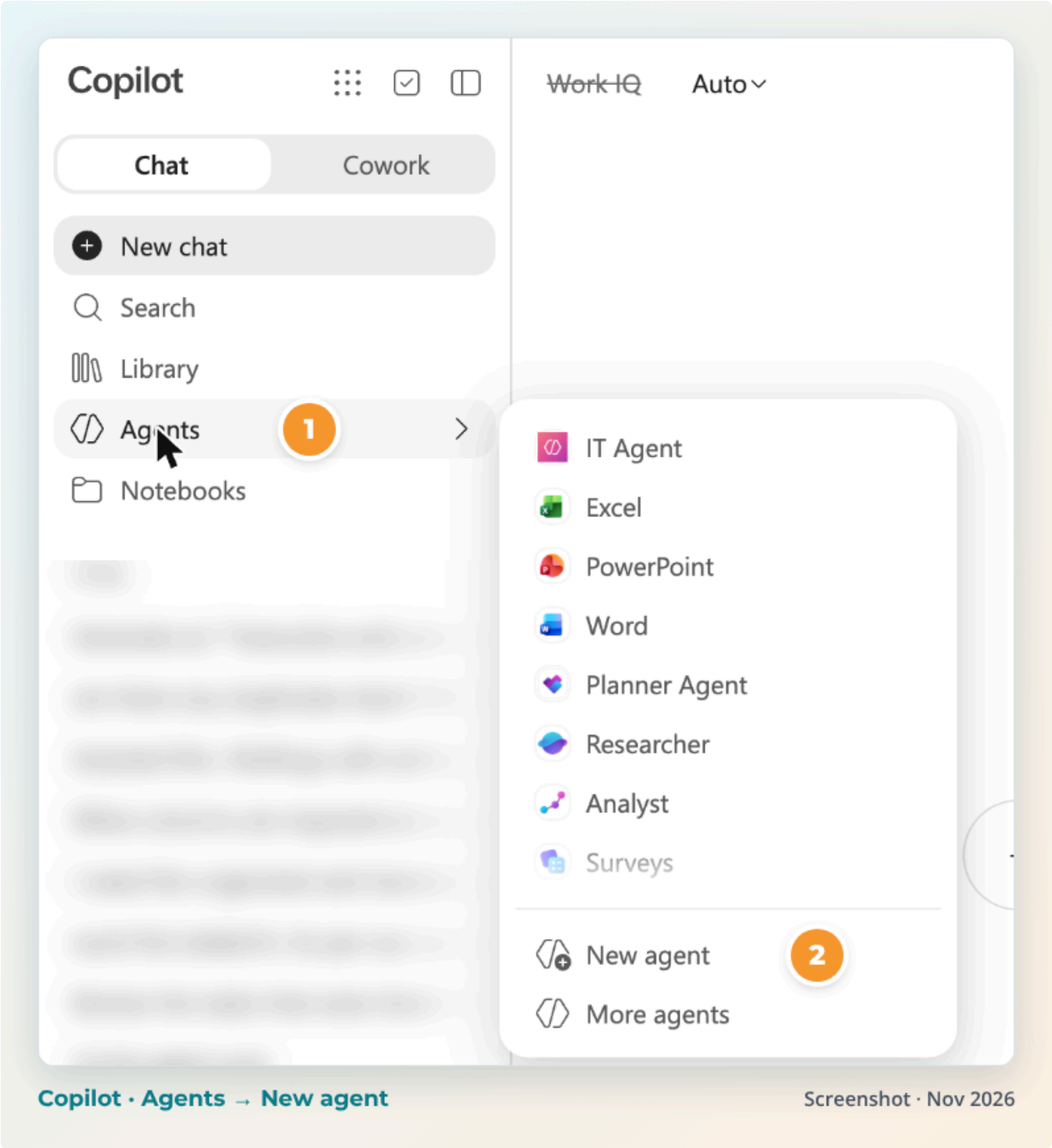
SOP 2: Create assistants from prompts (agents)

Data level: Yellow. The Parent Email Helper reads a parent's emails through your school Microsoft account, so never use a personal account. Never add student records to an agent's knowledge files.

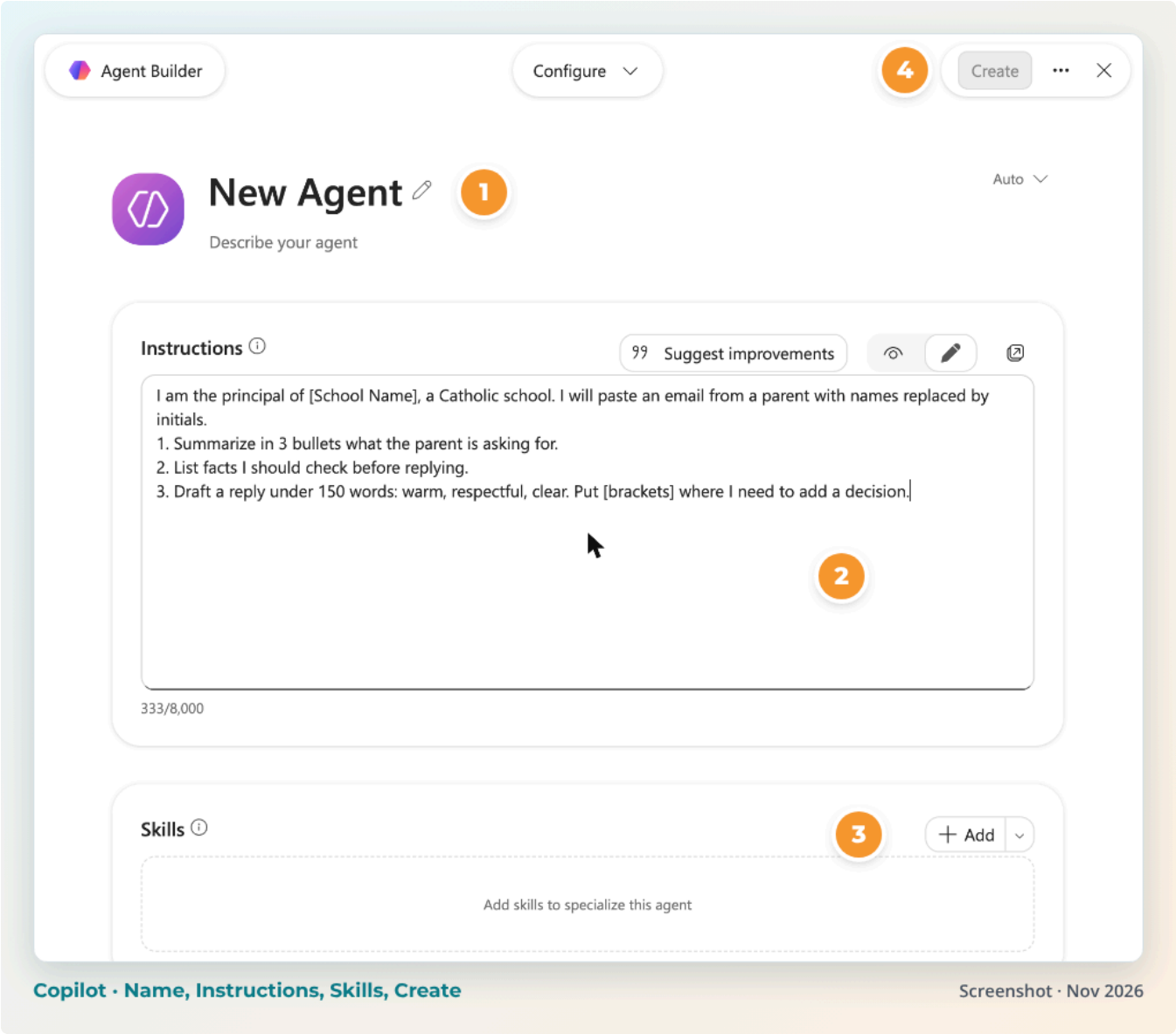
An agent is a saved Copilot assistant with its own instructions and, now, its own skills. You build it in Agent Builder inside Copilot Chat, with no code. Agents can use what Copilot can already see (OneDrive, SharePoint, Outlook, Teams), depending on your license.

Create an agent

1. In Copilot Chat, click **Agents → New agent** in the left menu.
2. Agent Builder opens. Describe the agent in the chat box ("An assistant that drafts replies to parent emails…"), or click **Skip →** to fill in the form yourself.
3. Click the pencil next to **New Agent** to name it (e.g., *Parent Email Helper*) and add a short description.
4. **Instructions:** paste one of the prompts below (or from SOP 5–6). Replace every [bracket]. **Suggest improvements** asks Copilot to tighten it.
5. Optional: under **Skills**, click **Add** to give the agent extra abilities.
6. Click **Create** (top right). It turns on once the agent has a name.
7. Use it from **Agents** in the left menu, or type @ and its name in Copilot Chat. Share it from the agent's menu if your admin allows.



Copilot · Agents → New agent Screenshot · Nov 2026



Copilot · Name, Instructions, Skills, Create

Screenshot · Nov 2026

No agent option? Save each prompt in a OneNote page or Word doc and paste it as your first message. Works the same.

Writing a good assistant prompt (any platform)

- **Role:** who it is ("communications assistant for [School Name], a Catholic school")
- **Input:** what you'll give it (notes, a parent's name to look up in your inbox, a class list)
- **Output:** the exact format, length and sections
- **Rules:** keep my voice, never invent dates, mark gaps with [CHECK], no student last names

Starter assistants in this kit

Assistant	Prompt is in
Friday Newsletter Builder	SOP 6
Morning Inbox Briefing	SOP 4
Walkthrough Planner, Calendar to Reminders	SOP 5
Parent Email Helper	Below
Write It, Then Polish It	Below

Parent Email Helper (agent instructions)

```
I am the principal of [School Name], a Catholic school. When I name a person, search my Outlook inbox for their emails from the last [7] days and read the most recent thread.
1. Summarize in 3 bullets what they are actually asking for or worried about.
2. List facts I should check before replying.
3. Describe the tone in one line.
4. Draft a reply under 150 words: warm, respectful, clear. Acknowledge the concern, say what the school will do next, and promise nothing I haven't decided. Put [brackets] where I need to add a decision.
Never send anything. If you find no emails from that person, tell me and stop.
```

Try it. Type a request like this, using a real parent's name. Reading your mailbox needs a Microsoft 365 Copilot license; on free Copilot Chat, open the parent's email in Outlook and use Copilot there instead.

```
Check my email for messages from [parent's name] in the last 7 days.
Summarize what they need and draft a reply I can review. Don't send anything.
```

Write It, Then Polish It (agent instructions)

```
I will paste a draft I wrote. Polish it but keep my voice and keep it no longer than my original.
- Fix grammar and make it clearer.
- Audience: parents (warm tone) or staff (direct, friendly tone). I will say which.
- Where it fits naturally, connect the message to our Catholic values in one or two sentences. Don't preach.
Show the polished version, then list the main changes.
```

Done when: the agent appears in your left menu and gives a good answer on a real example.

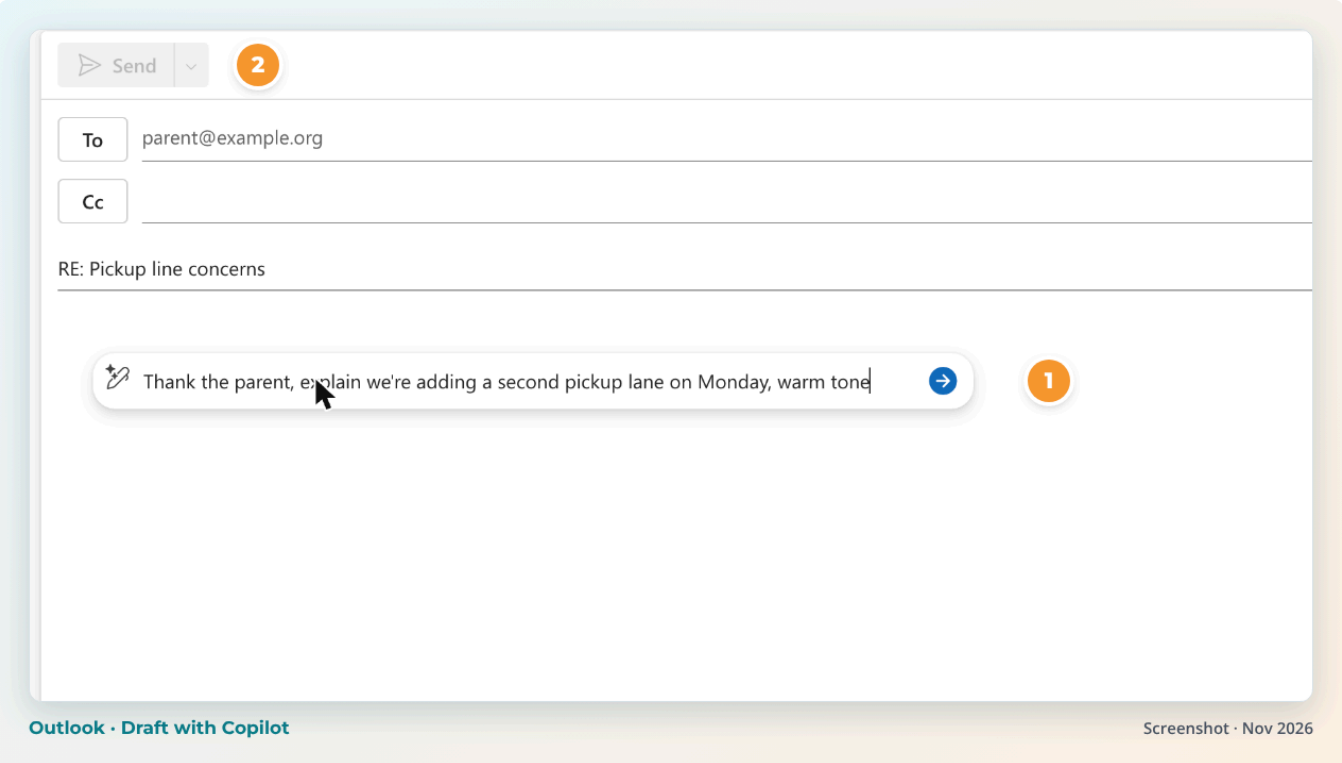
SOP 3: Copilot in Outlook, Teams and OneDrive

Data level: Yellow. Sign in only with your school Microsoft account, never a personal one. Don't copy IEP, health or discipline details from your mail into other chats.

Copilot is built into the Microsoft apps, so there's nothing to connect. What it can see depends on your license.

Use Copilot in Outlook

1. In Outlook, open a thread and click **Summarize** (Copilot) at the top of the message.
2. To write a reply or a new email, click the **Copilot** icon at the start of the message body (*Draft with Copilot*).
3. In **What do you want this email to say?**, type a plain request, e.g. *Thank the parent, explain we're adding a second pickup lane on Monday, warm tone*. Or pick a suggested prompt such as *Short and friendly message* or *Give update*.
4. Review and edit the draft, then send it yourself. **Coaching by Copilot** checks the tone of a sensitive reply.



Outlook · Draft with Copilot

Screenshot · Nov 2026

Use Copilot Chat with your files

1. In Copilot Chat, click **+** (attach) to add a Word, PDF or Excel file from OneDrive.
2. Ask questions about it: *List the dress code rules in this handbook.*
3. With a Microsoft 365 Copilot license, the **Work** tab can search your mail, calendar, Teams and files without attaching anything.

Try these first

```
Summarize this email thread in 3 bullets and tell me what the parent is asking for.
```

```
(Work tab, paid license) What's on my calendar this week, and which emails from staff still need a reply?
```

Outlook search shortcuts (no AI needed)

Type this	To find
from:smith	Emails from one person
to:pto folder:"Sent Items"	Emails you sent to someone
hasattachments:yes received:>=09/01/2026	Attachments since a date
subject:"field trip"	A subject phrase

Done when: you've summarized one real thread and drafted one reply with Copilot in Outlook.

SOP 4: Daily briefing

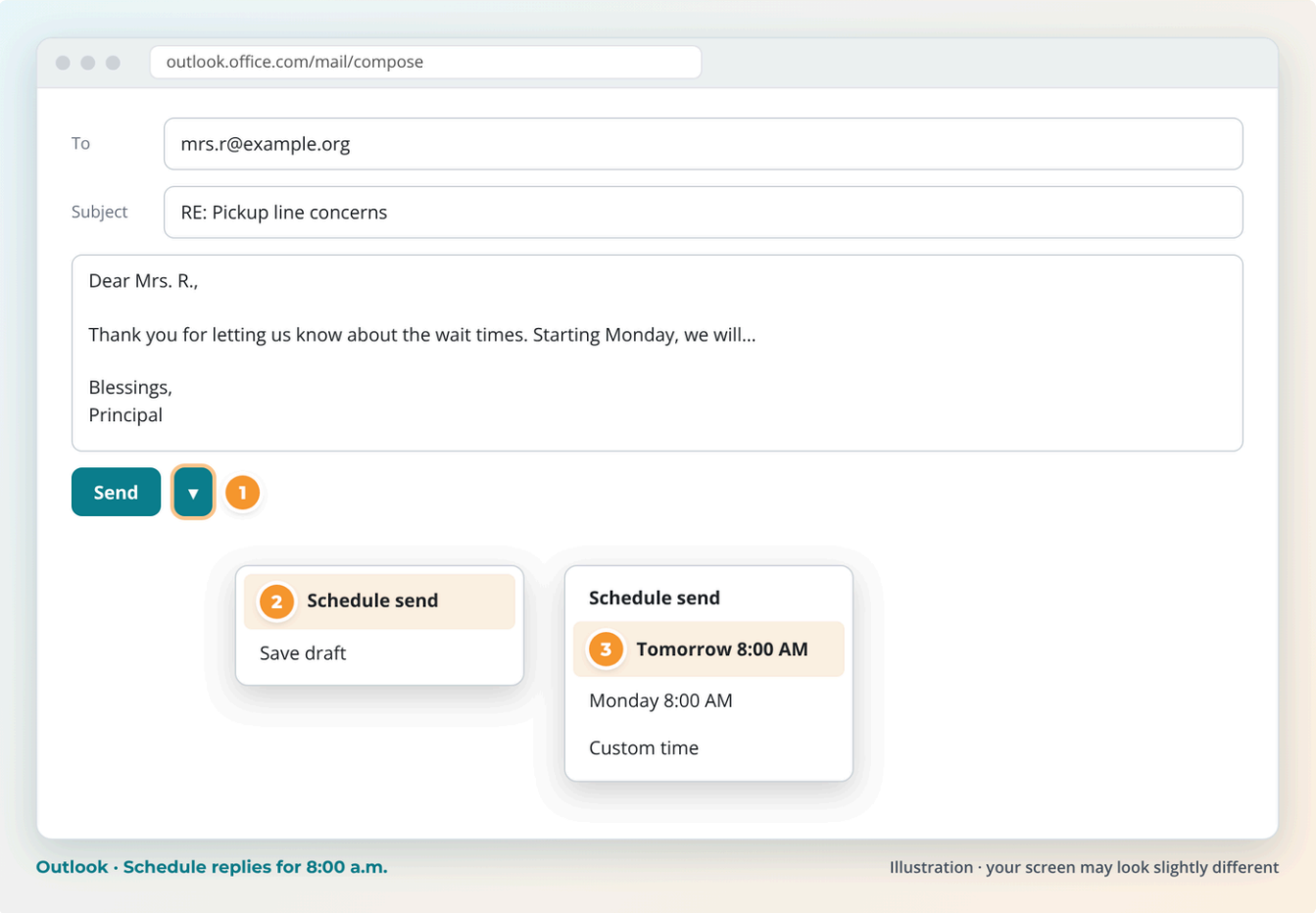
Data level: Yellow. The briefing reads your school inbox and only drafts replies. You review and send each one yourself.

How automatic the briefing can be depends on the license: free Copilot Chat needs a paste, paid Microsoft 365 Copilot can read your inbox and calendar and run on a schedule.

Option A: free Copilot Chat (works for everyone)

1. At 7:15 a.m., open Outlook and sort the inbox by **Unread**.
2. Use **Summarize** on the 3–5 longest threads.
3. Or select the overnight emails, copy their subjects and first lines, and paste them into Copilot Chat with the briefing prompt below.

4. Draft replies, edit them, and use **Schedule send** (the arrow next to Send) for 8:00 a.m.



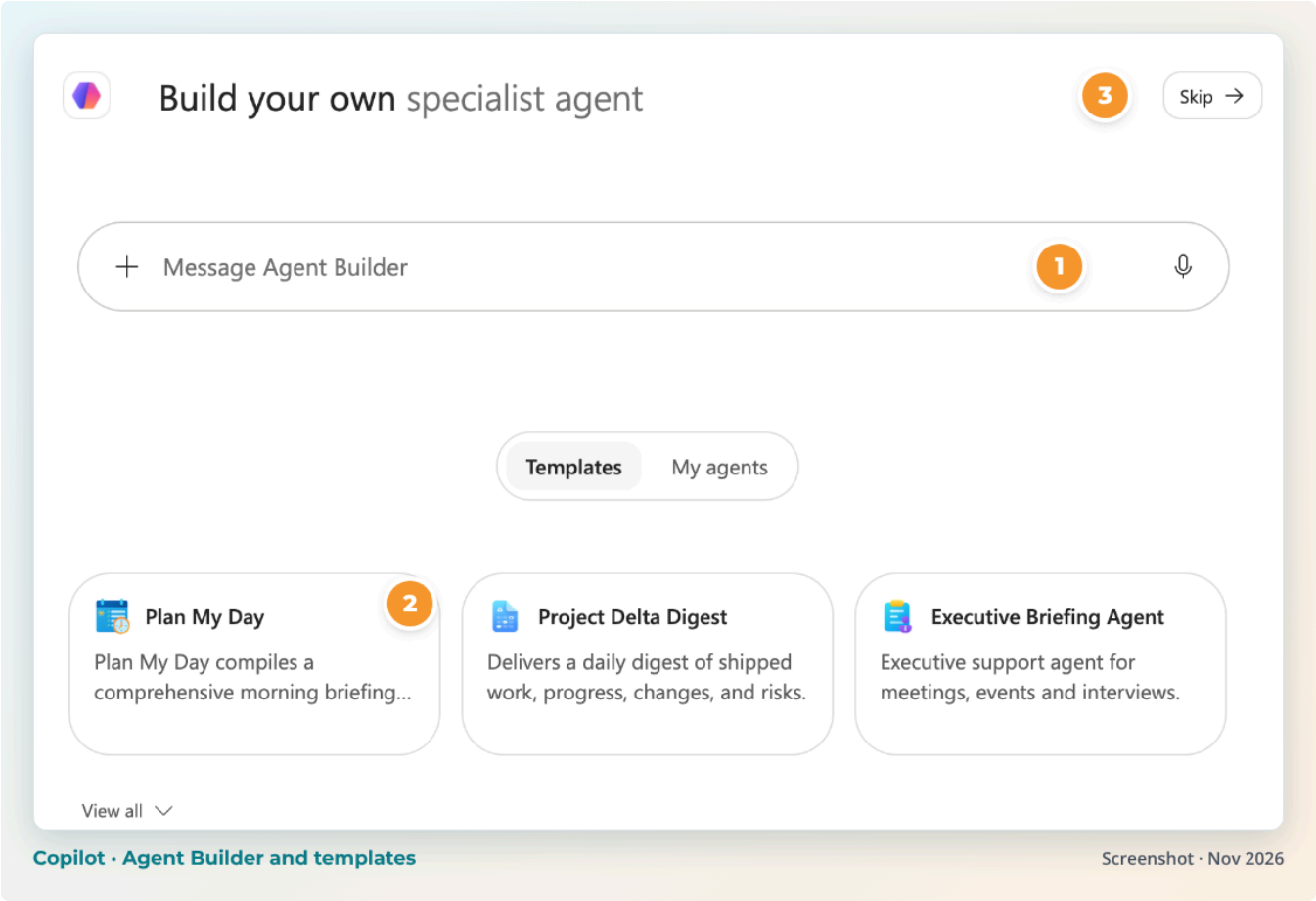
Outlook · Schedule replies for 8:00 a.m.

Illustration · your screen may look slightly different

Option B: paid Microsoft 365 Copilot

1. Open Copilot Chat → **Work** tab.
2. Paste the briefing prompt. Copilot reads your mailbox and calendar directly.
3. To repeat it daily, hover over your prompt and choose **Schedule this prompt** (if shown), set **Weekdays, 7:00 a.m.** Results arrive in Copilot Chat.

Shortcut: the Plan My Day template. In **Agents → New agent**, pick **Plan My Day** under **Templates**. It builds a morning-briefing agent; paste the briefing prompt below into its instructions to match your school.



Copilot · Agent Builder and templates

Screenshot · Nov 2026

Option C: fully automatic (IT setup)

A Power Automate flow can build the briefing every morning and email it to you. Ask IT for Education.

Briefing prompt

```
[1] YOUR ROLE
You are my principal assistant. I am the principal of [School Name]. My time
with teachers and students matters most, so protect it. Put school
operations, people, student needs, family communication, deadlines, and risk
ahead of low-value administrative noise.

[2] WHERE TO LOOK
Every morning at 7:00 AM, review:
- My Outlook inbox for the last 24 hours
- My Outlook calendar for today and the next 7 days
Ignore vendor marketing, newsletters, promotions, and sales outreach unless
they require a deliberate school decision.

[3] WHAT TO INCLUDE
```

```
Deliver a clear, scannable School Principal Morning Briefing with:
1. Top priorities: rank the most urgent and important items, explain why each
matters today, and state the next action.
2. Pending tasks: tasks, commitments, deadlines, and unanswered questions
from emails and meetings.
3. New issues: student/family, staffing, safety, facilities, compliance,
financial, or reputational issues that need my attention.
4. Today's schedule: meetings and events, preparation needed, conflicts, and
decisions or follow-ups that should result.
5. Upcoming holidays and key dates in the next 7 days.
6. Suggested delegation: what can be handed off and to which role (assistant
principal, front office, counselor/student services, HR,
operations/facilities, business office, or another role clearly named in the
source).
7. Draft replies: short, ready-to-review drafts only for messages that need a
response today.

[4] YOUR LIMITS
- Draft and suggest, but do not send, delete, move, accept, or change
anything.
- Show the source for every item (sender + subject, or calendar event +
time).
- Do not invent names, roles, or responsibilities that the source material
does not support. If something is unclear, say so.
```

Done when: you've used the briefing for 5 school days and adjusted the prompt (e.g., "shorter," "skip newsletters").

SOP 5: General scheduling

Data level: Yellow. Teacher names, rooms and schedules are fine. Leave student names out of rotations and checklists.

Three reusable agents cover the recurring scheduling work: walkthrough rotations, a Monday staff bulletin from the calendar, and finding meeting times.

5a. Walkthrough Planner (save as an agent)

```
Create a 2-week classroom walkthrough rotation.
Classes: [grade, teacher, room for each class]
Visit [2] classes per grade per week, [15] minutes each, only between
[times]. Avoid [lunch, specials, Mass].
Don't visit any room twice until every room has been visited once.
OUTPUT
1) A table by day and time.
2) A one-page printable checklist per visit: date, teacher, focus (learning
objective posted, student engagement, Catholic identity visible), notes line.
```

Copy the table into Word to print the checklist. Add the visits to Outlook Calendar as 15-minute events (or ask IT to import them in one step).

5b. Calendar to Reminders (weekly)

```
Here are the events on the school calendar for the next two weeks:
[paste events]
Write 1) a Monday staff bulletin: what's happening each day and what staff
need to prepare; 2) a short reminder for families, only for events that
affect parents.
Don't add events that aren't on the list. If a time or place is missing,
write [CHECK].
```

With a paid license, replace the paste with *Look at my calendar for the next two weeks* in the Work tab.

5c. Find a meeting time

In Outlook, create the meeting, add attendees and open **Scheduling Assistant** to see everyone's free time. With a paid license, ask Copilot: *Find three 30-minute slots next week when Ms. Lopez and I are both free.*

Done when: this week's walkthroughs are on your calendar and the Monday bulletin is drafted.

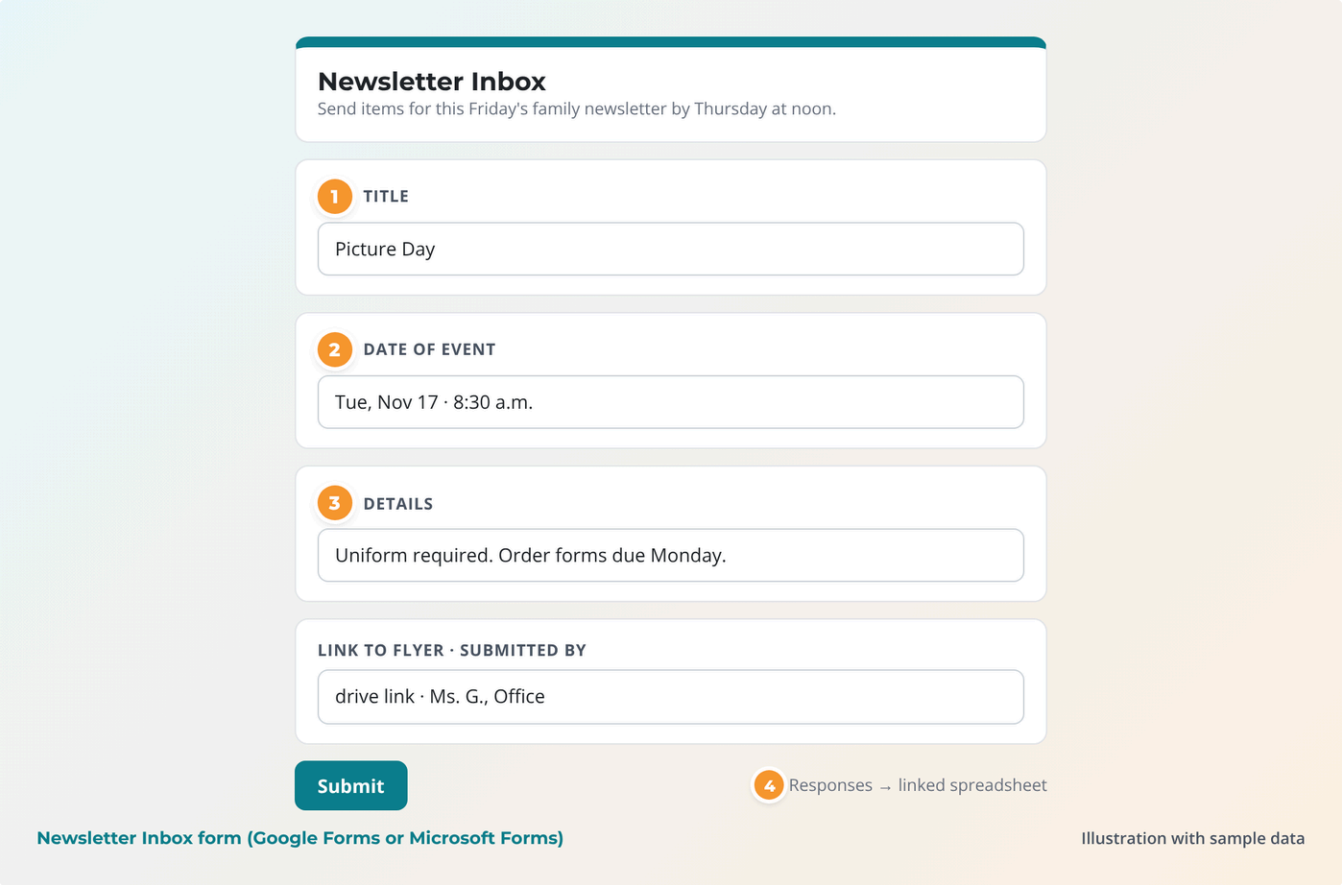
SOP 6: Weekly newsletter

Data level: Green. Newsletter content is public school news. Use first names only for student shout-outs, and follow your school's photo and permission policy.

Items collected all week plus one saved agent turn the Friday-morning scramble into a 10-minute review on Thursday afternoon.

Step 1: Collect items all week (one-time setup)

1. In **Microsoft Forms**, create **Newsletter Inbox** with fields: Title, Date of event, Details, Link to flyer, Submitted by.
2. Click **Responses → Open in Excel** so entries collect in a spreadsheet.
3. Share the form link with staff (pin it in your Teams staff channel). Add your own items during the week.



Newsletter Inbox form (Google Forms or Microsoft Forms) Illustration with sample data

Step 2: Create the Newsletter Builder agent (one time)

Follow SOP 2 and paste these instructions.

```
You are the communications assistant for [School Name], a Catholic school.
Each week I will give you rough notes, pasted form responses, photos of
flyers, or a voice-memo transcript. Turn them into our family newsletter.
FORMAT
1. Greeting (2-3 sentences). Reflect our Catholic faith naturally when it
fits: the liturgical season, a saint of the week, or a short Scripture verse.
2. "This Week at [School Name]": short highlights.
3. "Coming Up": a dated list (day, date, event, what families need to do).
4. "Reminders and Notices": forms, picture day, dress code, etc.
5. A short blessing, then my name and title.
RULES
- One page. Plain, warm language for busy parents. Keep my voice.
- Never invent dates, times, prices or details. If something is missing,
write [CHECK] and list your questions at the end.
- No student last names or private information.
AFTER THE NEWSLETTER ALSO GIVE ME
a) A 3-line version for staff.
b) If I ask, a translation for families (keep dates and names exactly as
written).
```

Practice first with sample notes. No real items yet? Paste these fictional notes to see how it works. The book fair has no times on purpose, so you'll see a [CHECK] question.

```
Riverside Prep: newsletter notes, week of Nov 16 (fictional practice sample)
- Picture day moved to Thursday, Nov 19, 8:30 a.m. Full uniform.
- 5th grade food drive for the parish pantry. Canned goods by Friday, Nov 20.
- No school Wednesday to Friday, Nov 25-27 (Thanksgiving).
- Advent Mass for families Monday, Nov 30, 9:00 a.m., in the church.
- Shout-out: Mrs. R's 3rd grade read 1,000 books this quarter!
- Book fair in the library Dec 2-4. Cash or card.
```

Step 3: Build it each week (Thursday, 10 minutes)

1. Open the agent in Copilot Chat.
2. Copy the week's rows from the Excel file and paste them, add rough notes, and attach photos of any paper flyers.
3. Answer every [CHECK] question.
4. Ask for changes in plain words: *shorter*, *warmer opening*, *move picture day to the top*.
5. Paste into your newsletter template in Word or Outlook, proofread once, and schedule it for Friday.

Already write it yourself? Use *Write It, Then Polish It* (SOP 2), or in Word click **Copilot → Rewrite** on your own draft.

Fully automatic option (IT setup): a Power Automate flow can compile the week's form entries into a draft every Thursday at 2:00 p.m. Ask IT for Education.

Done when: one newsletter has gone out with the agent's help and you've noted what to change in the instructions.

SOP 7: Generate the newsletter with the IT for Education skill

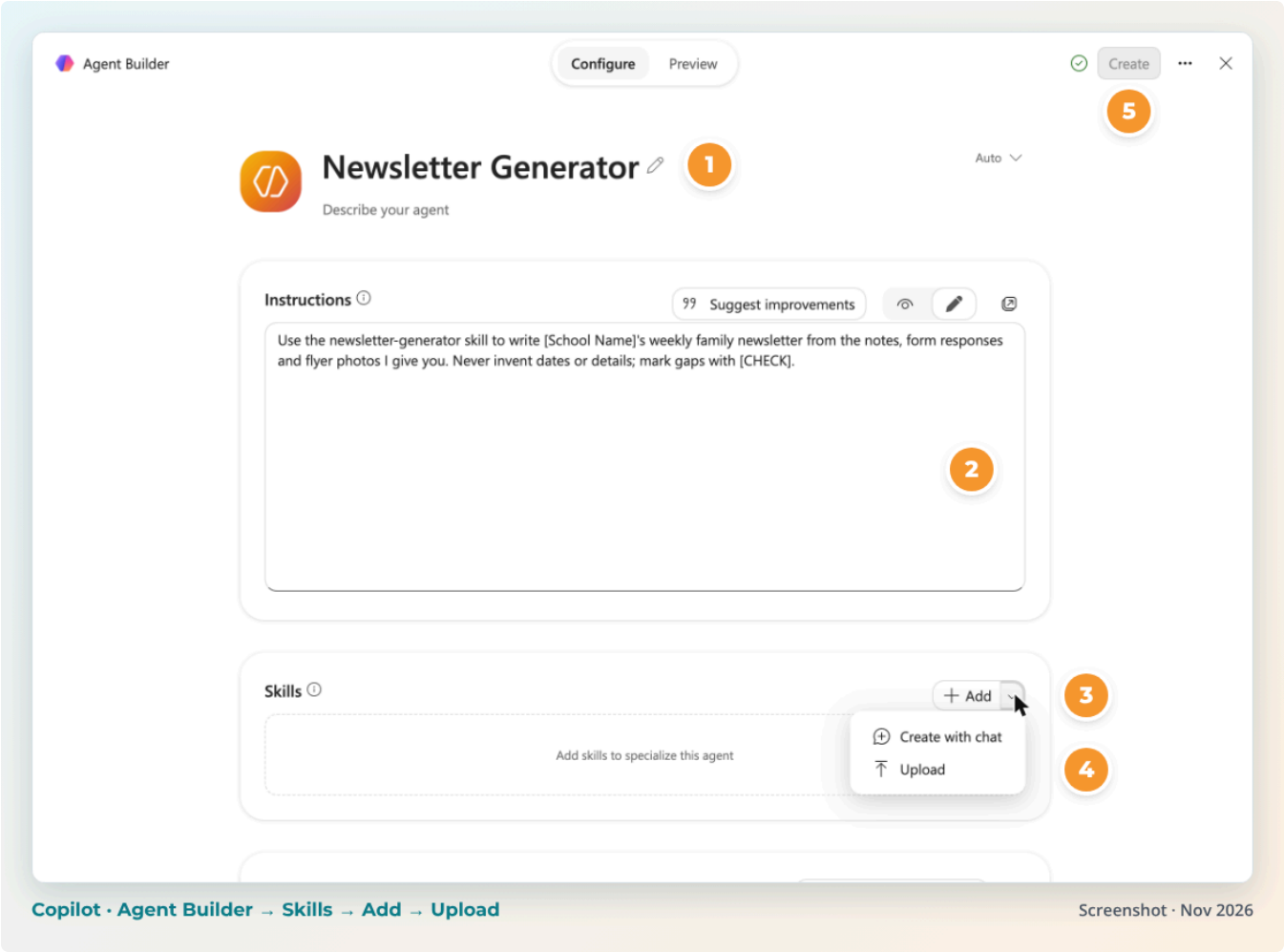
Data level: Green. Same rules as SOP 6: public school news, no student last names or private family details.

Instead of writing the Newsletter Builder instructions yourself (SOP 6, Step 2), you can upload the ready-made skill IT for Education built and tested into a Copilot agent. It takes about 5 minutes once, then each newsletter starts from one request.

Download: Newsletter Generator skill file.

Install it (one time)

1. Save the downloaded file to your computer as it is; don't unzip it.
2. In Copilot Chat, click **Agents → New agent**, then **Skip →**.
3. Click the pencil next to **New Agent** and name it *Newsletter Generator*.
4. **Instructions:** add one or two lines, e.g. *Use the newsletter-generator skill to write [School Name]'s weekly family newsletter from the notes, form responses and flyer photos I give you. Never invent dates or details; mark gaps with [CHECK].*
5. Under **Skills**, click the arrow next to **+ Add**, choose **Upload**, and select the file you downloaded.
6. Click **Create** (top right).
7. No **Upload** option? Your admin may limit agent skills. Unzip the file, open **SKILL.md** in Notepad or TextEdit, and paste its text (below the top block of settings) into **Instructions** instead.



Copilot · Agent Builder → Skills → Add → Upload

Screenshot · Nov 2026

Generate this week's newsletter

1. Open the **Newsletter Generator** agent from **Agents** (or type **@Newsletter Generator** in Copilot Chat).
2. Type *Create this week's family newsletter* and paste the week's items from your Newsletter Inbox (SOP 6), rough notes, or photos of paper flyers.
3. Answer any questions it asks, and fix every item marked [CHECK].
4. Read the whole draft. Check each date, time, name and price against your calendar before sending.
5. Paste it into your newsletter template in Word or Outlook and schedule it.

Example request. This is the request we use in the demo. Copy it and swap in your own items:

```
@Newsletter Generator Generate this week's newsletter

Faith & Community
1. Thanksgiving Food Drive: Bring canned goods and non-perishables through
```

```
Friday, Nov 20. Everything goes to the parish food pantry. The class that
collects the most wins a pizza party.
2. All-School Mass: Wednesday at 9:00 a.m. The 5th grade leads the liturgy.
Parents are welcome.
3. Advent begins Nov 29: Each family will get an Advent prayer calendar in
their child's folder next week.

Academics
4. Science Fair registration: 6th-8th grade project proposals are due Dec 4.
Forms are on the school website.
5. Spelling Bee winners: Congratulations to our classroom winners. They go on
to the school bee on Dec 10.
6. MAP testing complete: Fall results will go home with report cards.

Student Life
7. Student Council: Thank you to everyone who voted. Meet your new officers
on page 2.
8. Basketball tryouts: Boys' and girls' tryouts are Monday and Tuesday, 3:15-
4:30 p.m., in the gym. Students need a signed physical form.
9. Spirit Day Friday: Students may wear jeans with their school spirit shirt
for a $1 donation to the food drive.

Important Dates & Reminders
10. No school Nov 25-27: Thanksgiving break. Classes resume Monday, Nov 30.
11. Early dismissal Tuesday, Nov 24: Dismissal is at 12:30 p.m. There is no
after-care that day.
12. Lost & Found: Unclaimed items will be donated on Nov 24. Please check the
table by the front office.
13. Carpool reminder: Please stay in your car and keep the drop-off lane
moving. Thank you for your patience!

Thank You
14. Volunteer shout-out: Thank you to the HSA parents who organized last
week's Fall Festival. It raised $4,200 for new library books.
```

Done when: the agent appears under Agents and you've produced and reviewed one newsletter with it.

Troubleshooting and sources

Problem	Fix
No protected/shield label	You're signed in with a personal account. Sign out and use your school email.
No "New agent" option	Admin hasn't allowed agent creation (SOP 1, step 4). Save prompts in OneNote instead.
Can't upload files to an agent	File knowledge may need a Microsoft 365 Copilot license. Paste the content instead.
Copilot can't see my inbox or calendar	That needs the paid Microsoft 365 Copilot license. Use Option A in SOP 4.
Output too long or not your voice	Add a paragraph you wrote as an example and say "keep under one page."

Features differ by license and tenant, and menus change often. Screenshots in this guide come from a Microsoft 365 Copilot (paid) account; free Copilot Chat may show fewer options. Check against the sources below before each training.

Sources (checked Nov 4, 2026)

- Microsoft 365 Copilot in education (Microsoft)
- Build custom agents in Agent Builder (Microsoft Learn)
- Create an agent in Copilot Chat (Microsoft Learn)
- Use AI agents to create a newsletter builder (Microsoft Learn)

Next step: a free AI Readiness Assessment

Attended FCAC 2026? Your school's AI Readiness Assessment from IT for Education is complimentary. We review which AI tools your staff already use, how your accounts and data settings are configured, and where your policies have gaps. You get a report with clear next steps.

Book it: call 305-403-7582 or visit itforedu.com.

Disclaimer and terms of use

Last updated: November 13, 2026

1. Educational and informational purposes

IT for Education provides this guide, including its instructions, prompts, templates, screenshots, and downloadable resources, free of charge for general educational and informational purposes.

These materials do not constitute legal, cybersecurity, regulatory compliance, or other professional advice. They are provided "as is," without warranties of accuracy, completeness, suitability, or fitness for a particular purpose, to the extent permitted by applicable law.

2. Institutional responsibility and authorization

Each school, district, diocese, or educational organization is solely responsible for evaluating, approving, configuring, and supervising its use of artificial intelligence technologies.

Before implementing any recommended tool, integration, automation, or workflow, users should obtain all necessary institutional approvals and verify compliance with applicable laws, contractual obligations, internal policies, and technology requirements.

3. Student privacy and confidential information

Schools must protect student, family, employee, and institutional information.

Do not upload, disclose, or connect personally identifiable student information, educational records, health information, special education records, disciplinary information, financial records, credentials, or other confidential information to an AI service unless the institution has expressly authorized the specific use, established appropriate contractual and technical safeguards, and verified compliance with applicable requirements.

Relevant requirements may include FERPA, COPPA, CIPA, applicable state privacy laws, and institutional or diocesan policies, depending on the circumstances.

4. Human oversight and decision-making

Artificial intelligence systems can generate inaccurate, incomplete, biased, misleading, or inappropriate content.

All AI-generated materials must be reviewed by an appropriately authorized person before being communicated, published, or used.

AI outputs must not serve as the sole basis for consequential decisions involving students, employees, admissions, discipline, special education, safety, or other matters affecting individual rights or opportunities.

5. Third-party platforms and services

Google Gemini, Microsoft Copilot, ChatGPT, Claude, and other referenced technologies are independent third-party services governed by their respective terms, privacy policies, licensing arrangements, and security practices.

Features, availability, pricing, data-handling practices, and administrative controls may change without notice.

IT for Education is not affiliated with, sponsored by, or endorsed by these providers. References to their products, trademarks, and screenshots are for identification and instructional purposes only.

6. No professional service relationship

Accessing, downloading, or using this free guide does not establish a consulting, technical support, cybersecurity, legal advisory, or other professional service relationship with IT for Education.

Any implementation, configuration, consulting, training, or ongoing support services provided by IT for Education are subject to a separate written agreement.

7. Limitation of liability

To the maximum extent permitted by applicable law, IT for Education disclaims liability for losses, damages, security incidents, data disclosures, regulatory violations, operational disruptions, or other consequences resulting from the use of or reliance upon these materials or the third-party services described.

Nothing in this disclaimer excludes or limits liability that cannot lawfully be excluded or limited.

8. Accuracy and updates

Instructions and screenshots reflect product interfaces available as of November 2026. AI services change frequently, and users should verify current instructions, security settings, licensing requirements, and product capabilities through official vendor documentation.

IT for Education may update these materials without prior notice.

9. Information entered in this guide

The interactive version of this guide saves your school name and checkmarks only in your own web browser. This information is not sent to IT for Education or anyone else, and clearing your browser data removes it.

10. Connected accounts and automated tasks

Connecting an email account, calendar, or file storage to an AI service gives that service ongoing access to the connected information under the provider's terms. Schools should have their technology administrator approve each connection and review its permissions before staff connect accounts.

Scheduled and automated tasks run without a person watching. Users should review every result and pause or remove any task that is no longer needed or no longer works as expected.

11. Not for emergencies

AI tools can miss, misread, or misjudge urgent messages. They must never replace the school's safety, emergency, incident-reporting, or mandatory-reporting procedures, and must not be relied on to detect situations that require immediate action.

12. Staff use only

The tools and setups in this guide are intended for adult school staff. They are not designed for students and should not be configured on student accounts. Each provider's age requirements and eligibility rules apply.

13. Downloadable files

Downloadable files, such as skill files and templates, are provided "as is." The school's technology administrator should review each file before it is installed and decide whether uploads and skills are allowed in the school's accounts.

14. Sample content

Schools, people, and events in examples and practice materials, including "Riverside Prep," are fictional and included only for demonstration. Any resemblance to actual persons or organizations is coincidental.

15. Complimentary assessment offer

The complimentary AI Readiness Assessment is offered without any obligation to purchase services. It is subject to availability and scheduling capacity, and IT for Education may change or end the offer at any time.

16. Independent review

Schools are encouraged to consult their administrators, technology leadership, privacy officers, and legal counsel before implementing AI systems involving institutional or personal data.

Need help? IT for Education · 305-403-7582 · itforedu.com. Screenshots taken Nov 2026; the Schedule send and newsletter form images are illustrations. Your screen may look slightly different.