

AI Guidance for Safeguarders

Contents

1. Why Guidance is Needed.....	2
2. What is Microsoft 365 Copilot Chat?	2
3. Using Copilot Through Your Bridgeall Account	3
4. Ethical Principles for Using AI.....	3
5. What Copilot Can Help with.....	4
6. What Must Not Be Entered into Copilot	4
7. How to Use Copilot Safely.....	5
8. Writing Effective Prompts	5
9. Checking and Using Copilot Responses	6
10. AI Recording and Transcription Tools.....	6
11. Key Message for Safeguarders.....	7
Appendix One: Getting Started with Microsoft Copilot Chat - QUICK START GUIDE	1
1. Where to find it.....	1
2. What you'll see	1
3. How to use it	1
4. Sign in with your Safeguarder account.....	1
Appendix Two: Getting Set Up and Getting the Most Out of Copilot Chat - HINTS & TIPS	2
1. Setup checklist	2
2. Writing better prompts	2
3. Protecting confidential information	2
4. Where Copilot helps	3
5. What to keep out of Copilot	3
6. Generalise before you ask	3
7. Check before you use it	4
8. Productivity tips	4
9. Privacy.....	4

1. Why Guidance is Needed

Although AI can be very helpful, AI tools present risks for Safeguarders, to the children and families you work with, and to Children First as the organisation responsible for supporting the Safeguarders Panel. Guidance is needed to ensure that Safeguarders' handling of sensitive information remains compliant with:

- [UK GDPR](#)
- [Safeguarder Data Management Policy and Guidance](#)
- [Safeguarder Practice Standards and Guidance](#)
- your professional responsibilities as a Safeguarder

Safeguarders often work with highly sensitive personal data, including:

- identifiable information about children and young people
- detailed family backgrounds, including trauma, adversity, and lived experience
- health, education, and youth justice information
- Safeguarder analysis of information from children, families and professionals, and recommendations provided to Children's Hearings and courts

This information is classified as special category data under UK GDPR and is subject to strict confidentiality and security requirements. Safeguarders are independent, appointed by the Scottish Government, and are not employees of Children First. For this reason, they do not use Children First's internal systems or policies. Instead, policies and guidance are written specifically to support Safeguarders in their role.

2. What is Microsoft 365 Copilot Chat?

Microsoft 365 Copilot Chat is an Artificial Intelligence (AI) tool that allows you to generate text by typing instructions, known as prompts, in plain English.

It can support tasks such as drafting, summarising or structuring information.

As with all AI tools:

- responses may sometimes be inaccurate or misleading
- content can sound confident but still be wrong
- outputs must always be checked before being used

Safeguarders are fully responsible for reviewing and verifying any AI-generated content.

AI can support your work where appropriate, but it must never replace your professional judgement, analysis or independence.

3. Using Copilot Through Your Bridgeall Account

Safeguarders have access to Microsoft 365 Copilot Chat through their Bridgeall account.

When used correctly:

- your prompts and responses are protected within the Microsoft 365 environment provided through your Bridgeall account
- prompts and responses are not used to train AI models
- there are stronger safeguards than publicly available AI tools

You should ensure you are signed in using your Bridgeall account and using the protected version of Copilot before entering any prompts.

However, this does not remove your responsibilities as a data controller.

You must still ensure that:

- confidentiality is maintained
- sensitive information is protected
- your use of AI complies with GDPR and Safeguarder guidance

Safeguarders may also have access to other AI tools through personal devices or accounts. To limit the risk of personal information being shared outwith a protected environment, these tools **must not be used** for any work related to your Safeguarder role.

4. Ethical Principles for Using AI

When using AI tools, Safeguarders should ensure that their use is:

- rights based, and respects children's rights, privacy, dignity and participation
- connected to purpose, and supports the Safeguarder role
- confidential, and compliant with data protection responsibilities
- authentic, ensuring outputs do not replace your own professional voice and judgement
- accurate, with all content reviewed and verified before use
- free from bias, recognising that AI tools can make assumptions about people and situations

5. What Copilot Can Help With

Copilot can support general, low-risk tasks such as:

- structuring reports or drafting headings
- improving clarity and readability of your writing
- summarising publicly available legislation or guidance
- translating complex language into plain English
- proofreading grammar and tone
- generating ideas or approaches

It can be particularly helpful in drafting and refining written work, as long as no identifiable information is included.

If you are unsure whether information is appropriate to enter into Copilot, do not enter it and seek advice from the Safeguarders Panel Team.

6. What Must Not Be Entered into Copilot

Even when using the secure version of Copilot, you must not include:

- names or initials of children, family members or professionals
- dates of birth, addresses, schools or locations
- SCRA numbers, court references, report extracts, the draft of your reports, the reports of other
- any identifiable information
- sensitive health, education or justice information

This reflects the Safeguarder role as an independent data controller and the highly sensitive nature of the information you handle. This goes beyond system security and is based on your legal and professional responsibilities.

Although Microsoft 365 Copilot provides stronger protections than publicly available AI tools, Safeguarders should not rely on system controls alone when handling sensitive information. Protecting confidentiality remains your responsibility as a data controller.

It is also important to recognise that:

- entering personal information could compromise a child's rights to privacy and dignity
- AI systems may introduce bias or make assumptions about individuals or families

the use of AI must not result in generic or impersonal content which weakens the child's voice or your professional judgement

Examples of prompts for AI

Appropriate

"Create a structure for a report about a child's wellbeing, using clear headings and plain English."

Avoid including any real case information.

Not appropriate

"Summarise my notes from a meeting with [child's name] and suggest recommendations."

7. How to Use Copilot Safely

When using Copilot:

- keep all prompts general and anonymised
- use generic terms such as 'the child' or 'the parent'
- remove or change any identifying detail before entering text
- start with structure or outline requests rather than detailed content
- treat all outputs as drafts

AI should be used to support clarity and structure, not to analyse or interpret case information.

Safeguarders often hear deeply personal experiences from children and families. The use of AI must never undermine trust or the child's right to feel safe, respected and heard.

8. Writing Effective Prompts

Good prompts are clear and specific but remain general.

A helpful structure is:

- Task: what you want Copilot to do
- Context: general background, with no case detail
- Format: how you want the response presented

Example of a good prompt for AI

“Act as an experienced report writer. Create a clear structure for a child-focused report. Use plain English and include suggested headings.”

Avoid including any real case information.

AI must never be used to reach conclusions, determine recommendations or substitute the independent analysis expected of a Safeguarder.

9. Checking and Using Copilot Responses

Copilot outputs must always be reviewed before use.

You should:

- check accuracy and factual detail
- ensure the tone reflects your role and responsibilities
- remove any assumptions or bias
- confirm references are from trusted sources
- adapt the content so it reflects your own professional judgement

Copilot can make errors, including incorrect references or assumptions about people and situations.

Inaccurate or biased outputs could influence your analysis, and in turn, impact decisions made by Children’s Hearings or courts.

For all of these reasons, it is vital that Safeguarders proofread their reports carefully before submission.

10. AI Recording and Transcription Tools

AI note-taking or transcription tools, such as OneNote, Otter, Fireflies or similar apps, should not be used in your Safeguarder role.

These tools may:

- record full conversations rather than the relevant information needed for your report
- upload audio, transcripts or other data to external servers

- store information outside the UK or in locations that do not meet Scottish Government or Children First requirements
- retain, analyse or reuse sensitive personal information to improve their services

There are also important ethical considerations when working with children and families. Safeguarders may be involved in discussions about trauma, abuse, family relationships and other highly sensitive matters. The presence of recording or transcription technology could:

- affect a child's or family member's willingness to speak openly
- undermine trust and the relationship-building that is central to effective Safeguarder practice
- create uncertainty about how personal information will be used, stored and shared
- raise concerns about informed consent, particularly where children may not fully understand how AI technology processes information

11. Key Message for Safeguarders

- Use Microsoft 365 Copilot only through your Bridgeall account
- Do not use the public version of Copilot or any other AI tool for Safeguarder work
- Do not enter any identifiable or case-specific information
- Use AI only for general, low-risk tasks
- Proofread and review any AI outputs
- Always apply your professional judgement and independence
- You remain fully responsible for all content you produce

Protecting children's rights, privacy and confidentiality must remain at the centre of all decisions about the use of AI.

Appendix One: Getting Started with Microsoft Copilot Chat - QUICK START GUIDE

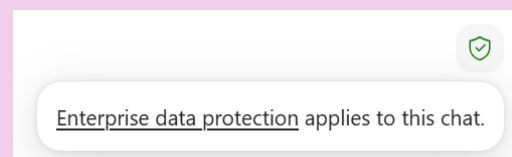
Included with your Microsoft 365 subscription.

1. Where to find it • Open copilot.cloud.microsoft in your browser. • Or go to m365.cloud.microsoft and click Copilot in the left-hand menu. • In Microsoft Edge, click the Copilot icon at the top-right of the toolbar. • In Microsoft Teams, add the Copilot app from the apps gallery.	2. What you'll see • A welcome screen with sample prompts you can click. • A large prompt box at the bottom. This is where you type. • A Web / Work toggle near the prompt box (use Web). • A list of your previous chats down the left. • A New chat button to start a fresh conversation.	3. How to use it • Type a clear instruction and press Enter. • Read the answer, then ask follow-up questions in the same chat. • Click New chat when you change topic so old context isn't carried over. • Use the copy button to paste the answer into Word or Outlook. • Always check facts and legal references before using the output.
--	--	--

4. Sign in with your Safeguarder account

Always sign in with your safeguarder.org email account. Look for the green shield and the words **"Your personal and company data are protected"** near the prompt box. If you don't see this, you're not using the protected version. Sign out and sign back in with the correct account.

You should see a green shield showing that your personal and company data are protected. Hover over the shield to view the protection details.



Tip: pin copilot.cloud.microsoft to your browser favourites so it's always one click away.

Appendix Two: Getting Set Up and Getting the Most Out of Copilot Chat - HINTS & TIPS

Guidance for professionals working on legal reports involving children.

1. Setup checklist

- Sign in with your safeguarder.org account and check for the green “Protected” shield before you start typing.
- Bookmark copilot.cloud.microsoft in your browser. It's the fastest way in.
- Pin Microsoft Edge to your taskbar; the Copilot icon sits at the top-right.
- Add the Copilot app inside Microsoft Teams so you can chat without leaving Teams.

Keep a personal Word document of useful prompts so you can reuse the ones that work.

2. Writing better prompts

A useful prompt usually has four parts. You don't need all four every time, but the more detail you give, the better the answer.

- **Persona:** Sets the role you want Copilot to take. For example, “Act as an experienced legal report writer.”
- **Task:** The specific thing you want done. For example, “Draft an outline for a welfare report.”
- **Context:** Background information kept general and never case-specific.
- **Format:** How you want the answer presented. For example, “as a bulleted list of no more than 200 words.”

	Example
Weak	<i>“Write about child protection law.”</i>
Strong	<i>“Act as a Scottish child law researcher. In around 300 words, explain the welfare principle and the requirement to consider a child's views under the Children (Scotland) Act 1995. Use plain English and present the information as a bulleted list suitable for a non-lawyer audience.”</i>

3. Protecting confidential information

Copilot can be a useful tool for drafting, editing and summarising information, but Safeguarders must always protect children's and families' privacy.

Only use:

- Publicly available information, such as legislation, guidance and published reports.
- Fully anonymised content where all identifiable details have been removed.

Never enter:

- Names of children, parents, carers or other family members.
- Dates of birth, addresses, schools or contact details.
- Children's Hearing details, court information or case reference numbers.
- Any information that could identify a child, family or professional involved in proceedings.

If in doubt, remove the information or don't use Copilot for that task.

4. Where Copilot helps

Copilot can support a range of writing and research tasks, including:

- Summarising publicly available legal frameworks such as the Children (Scotland) Act 1995, Health and Social Care Standards and statutory guidance.
- Drafting report templates, section headings and standard wording.
- Rephrasing dense or jargon-heavy paragraphs into plain English.
- Proofreading for clarity, grammar and tone.
- Sketching out the structure of a report before you start writing.
- Creating glossary entries and definitions for technical terms.
- Translating legal jargon into language a parent or carer will understand.
- Suggesting alternative phrasings to soften, tighten or formalise your writing.

5. What to keep out of Copilot

Your professional confidentiality and data protection duties still apply, regardless of how secure the chat is. Don't put any case detail into Copilot.

- Any child's name, family member's name or initials.
- Case numbers, court references, social work IDs or reference numbers.
- Dates of birth, addresses, postcodes, school names or other identifying details.
- Direct quotations or extracts from confidential case papers.
- Health, education, offending or social care information about a real person.

6. Generalise before you ask

Strip out the detail and use generic placeholders. Copilot doesn't need to know who anyone is to help with the writing.

- Use “the child”, “the young person”, “the parent”, “the local authority” or “the social worker”.
- Replace specific dates with “recently”, “over the last six months” or “at the relevant time”.
- Remove place names. Say “a primary school” or “a contact centre” instead.

- If you need to paste a sentence to be rephrased, scrub it of names, ages and locations first.

7. Check before you use it

Copilot can sound confident and still be wrong. It can invent case names, mis-cite sections and confuse jurisdictions.

- Check every statute, section number and case citation against the original source.
- Use legislation.gov.uk for UK statutes and [BAILII \(bailii.org\)](https://bailii.org) for case law.
- Treat anything Copilot produces as a first draft, not a finished product.
- If a fact matters to your report, confirm it from an authoritative source before you include it.

8. Productivity tips

- Build-up in stages. Ask for an outline first, then expand each section, then refine the tone.
- For complex requests, tell Copilot to ask you clarifying questions before it answers. You'll get a better result.
- Keep a personal prompt library in Word or OneNote. Copy and paste the ones you use most.
- Pressure-test your own work with questions like “what have I missed?”, “what's the counter-argument?” or “how could this be clearer?”
- If an answer isn't quite right, don't start over. Reply with what to change.

9. Privacy

When you're signed in with your work account, Enterprise Data Protection applies. Your prompts and responses aren't used to train Microsoft's models and aren't visible to Microsoft staff. That technical safeguard doesn't replace your professional duties around confidentiality, data protection or court orders. If you're unsure, leave it out and check with your Information Governance or Data Protection lead.