

# Capital University

## AI Guidebook:

## Using Generative AI in Administrative Tasks



# Using AI in Administrative Tasks

This *AI Guidebook* section is written for staff and faculty, and particularly those who are new to using AI tools for work.

AI can help to improve efficiency in daily work. Whether it's automating meeting notes, managing communications, or handling repetitive administrative tasks, AI can take on routine responsibilities so that employees can focus on more complex, strategic, and rewarding work.

For administrative departments at Capital University, AI should be considered a productivity tool—not as a replacement for human expertise. GenAI should support decision-making but not be the decision maker. When implemented thoughtfully, AI can accelerate workflows while ensuring transparency, security, and compliance with institutional policies.

This section provides guidance for employees exploring AI's potential in their work. It covers practical applications, key considerations, and best practices to make informed choices about integrating AI into procedures while maintaining accuracy and oversight.

## Best Practices

**Transparency & Disclosure:** Clearly communicate when AI is used, especially in student- or faculty-facing applications. If AI-generated responses are used in email replies, chatbots, or reports, indicate that AI assisted in their creation. This helps manage expectations and fosters trust in the author. We can maintain accountability and track effectiveness by documenting AI processes. Keep records of AI-driven tasks to assess efficiency, ensure human oversight, and serve as a resource for onboarding and training new department members.

**Human Oversight & Quality Control:** AI should assist employees, not replace them. AI can make mistakes, misinterpret prompts, or provide incorrect data, so a final human check is essential. For example, when AI is used to draft reports, summarize meetings, or generate recommendations, a human should always validate the output before it is officially used.

Use AI as a starting point, not the final product. Always refine and edit any AI-generated content for accuracy, and ensure it reflects the policies and procedures of your functional area.

**Data Security & Compliance:** Follow [Capital University's data security policies](#) when using AI tools. When working with sensitive data, we all must ensure that the tools we use comply FERPA, HIPAA, and state and federal regulations. When in doubt, use AI only for general administrative tasks that do not involve personal data.

If you are working with student, employee, or financial data then here are some FERPA dos and don'ts:

|                                                                                                         |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
|---------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|  <p>FERPA Dos</p>    | <ul style="list-style-type: none"> <li>• Use only FERPA-compliant AI platforms that are approved by the university under a written agreement.</li> <li>• Audit and monitor how approved AI platforms interact with student, employee, and financial data.</li> </ul>                                                                                                                                                                                                                |
|  <p>FERPA Don'ts</p> | <ul style="list-style-type: none"> <li>• Don't share personally identifiable information with third-party AI tools not covered under a FERPA agreement.</li> <li>• Don't input student grades, addresses, or IDs of other information into public or non-compliant AI platforms.</li> <li>• Don't use AI tools that store or reuse data without ensuring compliance with FERPA.</li> <li>• Don't assume a tool is compliant just because it is widely used in education.</li> </ul> |

**Training & AI Literacy:** Before using AI tools, staff should understand the functionality, limitations, and ethical considerations of the platform. Participate in professional development opportunities focused on AI literacy and responsible usage. Share

experiences and feedback with colleagues across the institution. AI tools evolve quickly, and discussing successes or challenges can help the entire campus community learn and grow together.

**When to Implement AI:** Use AI where it adds clear value, reducing inefficiencies rather than complicating workflows. Start by identifying administrative pain points where AI can provide meaningful support, such as scheduling, summarizing information, or drafting standard communications. Assess AI tools on small tasks first to determine the impact and reliability before using it on larger projects. Using AI in a limited capacity first allows staff to evaluate its usefulness without disrupting existing processes.

Don't use AI for the sake of using it. If a task is better handled by a person, there's no need to introduce AI. AI is meant to enhance productivity, not replace effective human workflows. By following best practices, administrative staff can use AI effectively to enhance their work.

## Examples of Acceptable Use

AI can assist in a variety of administrative tasks, improving efficiency and reducing time spent on repetitive work. Below are some examples of how you can implement AI to improve your work.

| Productivity & Workflow Automation                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 | Communication & Engagement                                                                                                                                                                                                                                                                                                                                                                                                                                                                            | Data Analysis                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    | Administrative Support & Compliance                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <ul style="list-style-type: none"> <li>• <b>Meeting Notes:</b> AI can transcribe and summarize meetings, making it easier to take notes, draft minutes, and follow up on action items.</li> <li>• <b>Report Writing and Formatting:</b> AI can draft reports, consolidate information from multiple sources, and format documents.</li> <li>• <b>Scheduling:</b> AI-powered assistants can organize calendars, set reminders, and schedule meetings based on availability.</li> <li>• <b>Task Management:</b> AI can break down larger projects into manageable tasks and track progress.</li> <li>• <b>Spreadsheets:</b> AI tools can generate formulas, clean up datasets, and create data visualization in Excel or Google Sheets.</li> <li>• <b>Coding Assistance:</b> AI can generate scripts or automate small tasks in programming languages like Python, JavaScript, or C# to streamline repetitive tasks. AI can assist with HTML and CSS for web development.</li> </ul> | <ul style="list-style-type: none"> <li>• <b>Drafting Email Communications:</b> AI can compose email drafts, ensuring consistent and professional communication.</li> <li>• <b>Chatbots:</b> AI-driven chatbots can provide instant responses to common inquiries, freeing up time and providing "always on" help outside of business hours.</li> <li>• <b>Content Creation:</b> AI can analyze engagement trends, and suggest content strategies for social media, blogs, and other media.</li> </ul> | <ul style="list-style-type: none"> <li>• <b>Survey Analysis:</b> AI can analyze survey responses, identify trends, and summarize key takeaways from data sets. However, using AI tools to analyze survey data poses a threat to the confidentiality of research participants' data and to research participants' anonymity and privacy, so check with Capital's IRB (Institutional Review Board) prior to using AI for analyzing data from human subjects' research.</li> <li>• <b>Enrollment and Resource Planning:</b> AI can assess historical data to forecast enrollment trends and assist in decision-making for academic planning.</li> <li>• <b>Data Cleanup and Standardization:</b> AI can organize and validate datasets, reducing inconsistencies and errors.</li> <li>• <b>Financial Projections and Budget Analysis:</b> AI can analyze financial data, highlight spending trends, and forecast budgeting based on historical patterns.</li> </ul> | <ul style="list-style-type: none"> <li>• <b>Policy Compliance Checks:</b> AI can review documents for compliance with institutional policies and flag inconsistencies.</li> <li>• <b>Budget and Expense Tracking:</b> AI-driven financial tools can categorize expenses, generate reports, and identify spending patterns.</li> <li>• <b>Hiring and Orientation Assistance:</b> AI can assist with applicant screening, organize orientation documents, and track training progress for new employees.</li> </ul> |

## Troubleshooting

AI tools are evolving at rapid pace, and as such, may introduce complications for users. This section will attempt to provide advice for some of the more common issues.

#### AI-Generated Content is Inaccurate or Misleading

- Double-check AI-generated responses for accuracy before using them.
- Provide clear, specific prompts to improve output relevance.
- Cross-reference AI-generated content with trusted sources.

#### AI Struggles with Context or Tone

- Edit AI-generated content to align with the appropriate voice and tone.
- Use AI as a first draft and refine manually for clarity and professionalism.

#### AI Is Producing Biased or Unintended Results

- Be aware that AI may reflect biases present in its training data.
- Review AI outputs for fairness and neutrality before implementation.

#### AI Tools Are Not Producing Expected Results

- Experiment with different AI platforms or refine prompts to get better responses.
- Ensure staff have proper training on how to effectively use AI tools.

By understanding these common challenges and how to approach them, you can use AI more effectively. AI is a tool, and like any tool, its effectiveness depends on how you use it. Approach AI with intention—leveraging it to streamline tasks, improve efficiency, and free up time for more meaningful work. While AI can handle repetitive or data-heavy processes, it's up to you to decide where it fits into your work and how it can best support your goals.

If you are interested in exploring AI further, consider reviewing Capital University's institutional policies, attending professional development sessions, or keeping up with trends in AI adoption in higher education. The landscape is always evolving, and staying informed will help you make the most of these tools.

### How do I get started with using AI for administrative tasks<sup>1</sup>?

Identify repetitive or time-consuming tasks that follow predictable patterns and involve text or data.

Select the AI tool based on needs and data sensitivity (see the *AI Guidebooks'* AI Tools section).

Ask the AI tool to do the task. (e.g., Use a prompt like: "Draft an email to college students about completing the FAFSA." Or, "Create a checklist for students to meet with their academic advisor and schedule classes for next semester." Or, ask AI to outline a process that you routinely do.

Review the AI tool's output: What was good? What was incorrect? What needs to be edited. Do you need to use follow-up prompts to get more useful information?

Track time saved, accuracy improvements, or faster task completion.

<sup>1</sup> Thank you to the employee who suggested including information about getting started with AI.

## Sources

OpenAI. (2025). *ChatGPT* [Large Language Model]. <https://chat.openai.com/chat>

## Document History

**Initial Publication July 2025:** Drafted as part of Capital University's AI Initiative and made available to the campus community for comment and input prior to publication.