



Rev July 2026

### **“Sandbox Time”– Using AI at Merion Residential**

#### **Suggested AI Task List (Examples)**

- AI can be used as a tool in the workplace to assist with or handle various tasks including items that are repetitive or time-consuming.
- The AI pilot group will be allotted “sandbox time” during which you are authorized to spend time using an AI application to perform your work.
- The “sandbox time” is designed to create a controlled, safe environment to explore, experiment, and create. **It is important to note that you should NEVER enter personally identifiable information (PII) or other sensitive data like individual leases, business agreements, specific work order history, or company financial information or business records into an AI application.**
- At Merion Residential, we are asking the AI pilot group to explore practical ways AI can help support you in your daily work and decisions to help you perform at a more efficient and higher level. Below are examples of ways that you can use the AI tools during the pilot period to test and document the effectiveness of each AI application. You do not have to utilize the examples to “test” the AI tool, the examples below are suggestions but not requirements.

| <b>Work Group (Leasing or Maintenance)</b> | <b>Suggested AI Task</b>                                                                                                                                     |
|--------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------|
| All                                        | Create an agent to assist with determining ways to perform a work task more efficiently.                                                                     |
| All                                        | Use AI to digest a long document to extract the key takeaways.                                                                                               |
| Maintenance                                | Use AI to create and manage preventative maintenance tasks, i.e., track the condition of the property, forecast future maintenance needs, etc.               |
| Maintenance                                | Use AI to perform inspections more efficiently (i.e., property walks, unit inspections, roof inspections, capital project reviews, etc.).                    |
| Maintenance                                | Use AI to identify maintenance defects (i.e., damaged siding, missing dryer vents, roof deterioration, trip hazards, landscape concerns, and safety issues). |
| Maintenance                                | Use AI to generate inspection reports.                                                                                                                       |

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|-------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Maintenance | Use AI to create a Standard Operating Procedure (SOP) for scheduled preventative maintenance inspections.                                                                                                                                                                                                                                                                                                                           |
| Maintenance | Use AI to provide knowledge based and technical support to make a repair.                                                                                                                                                                                                                                                                                                                                                           |
| Maintenance | Use AI to track key business metrics such as warranty information, safety policies, and maintenance best practices.                                                                                                                                                                                                                                                                                                                 |
| Maintenance | Use AI to answer technical questions and assist with troubleshooting in real time.                                                                                                                                                                                                                                                                                                                                                  |
| Maintenance | Use AI to provide guidance for repairs such as step-by-step procedures.                                                                                                                                                                                                                                                                                                                                                             |
| Maintenance | Use AI to prioritize work orders by identifying the urgency of each issue including after-hours requests. ( <i>Work with your Community Manager and Maintenance Supervisor on this project.</i> )                                                                                                                                                                                                                                   |
| Maintenance | (On Call) Use AI to help a resident troubleshoot minor maintenance issues to ensure that after hours service requests are focused on major issues. ( <i>Work with your Community Manager and Maintenance Supervisor on this project.</i> )                                                                                                                                                                                          |
| Leasing     | Use AI to assist with resident and prospect communication – assist with responding to phone calls more efficiently and in a timely manner, assisting with after-hours requests from residents, etc.                                                                                                                                                                                                                                 |
| Leasing     | Use AI to generate documents (i.e., rent due letters, renewal letters, etc.).                                                                                                                                                                                                                                                                                                                                                       |
| Leasing     | Use AI to help prioritize your work and to maximize time management in the leasing office.                                                                                                                                                                                                                                                                                                                                          |
| Leasing     | ( <i>AI can be used to design, deliver, and optimize training. AI can help Merion create more effective and personalized learning experiences.</i> ) What are some training topics where you think AI can be utilized as a collaborative learning tool? (Examples – To explain company policies, Fair Housing laws, Yardi processes, CRM processes, the Guarantors, Lease Lock, monthly checklists, other training materials, etc.) |
| Leasing     | Are there any tasks that you perform that you think that AI can help you perform more efficiently? (Examples – Reverse a move-out in Yardi, when to refer an individual to The Guarantors, how to process a transfer, etc.)                                                                                                                                                                                                         |
| Leasing     | Use AI to generate first versions of emails, reports, etc.                                                                                                                                                                                                                                                                                                                                                                          |
| Leasing     | Use AI to compile background information on a business topic or to cross-reference business information.                                                                                                                                                                                                                                                                                                                            |
| Leasing     | Use AI to take unstructured notes or data points and organize the information into structured tables, action items, and/or task lists.                                                                                                                                                                                                                                                                                              |
| Leasing     | Use AI to review (non-sensitive) business data that you provide to identify patterns, gaps, or forecast performance without requiring advanced spreadsheet formulas.                                                                                                                                                                                                                                                                |

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|---------|-------------------------------------------------------|
| Leasing | Use AI to review a lease to look for key information. |
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### **Important AI Usage Rules:**

- a) AI assists human decision-making and accelerates workflows but does not replace human accountability. **Humans must always review, edit, and approve AI outputs.**
- b) AI can be a personal productivity partner by handling routine administration so that you can focus on other high-value, strategic work.
- c) As you use the “sandbox time” to dabble with AI, please document the tasks that you perform and measure how much time is saved so that we can formally track and assess the value of the tool.
- d) Reminder - You should NEVER enter personally identifiable information (PII) or other sensitive data like individual leases, business agreements, specific work order history, or company financial information or business records into an AI application.

## Common AI Terminology

- **AI (Artificial Intelligence):** A broad field of computer science focused on creating machines capable of performing tasks that typically require human intelligence, such as learning, reasoning, and problem-solving.
- **AI Agent:** An advanced AI that doesn't just answer questions, but autonomously plans, makes decisions, and executes multi-step tasks on your behalf (e.g., booking a trip or updating a database).
- **AI Chat:** An AI chat is an interactive conversation with an artificial intelligence system. Instead of clicking preset buttons, you type or speak to the AI, which uses advanced language models to understand your intent and respond naturally. You can use these tools to brainstorm ideas, write content, summarize documents, or get coding assistance.
- **AI Model:** An AI model is a software program trained on vast amounts of data to recognize patterns, make decisions, or generate new content. Instead of following hard-coded rules, it learns from examples to autonomously predict outcomes or perform complex tasks like analyzing language, recognizing images, or writing code.
- **Generative AI:** AI designed to create *new* content (text, images, audio, video, or code) rather than just analyzing existing data.
- **Hallucination:** An error where an AI confidently invents false, misleading, or made-up information, presenting it as fact.
- **LLM (Large Language Model):** A massive AI model trained on vast amounts of text. It understands grammar, context, and concepts, allowing it to converse naturally and write human-like text (e.g., GPT-4, Claude, Gemini).
- **Machine Learning (ML):** A subset of AI where computers learn from historical data and identify patterns without being explicitly programmed to do so.
- **Multimodal Model:** An AI that can process and combine different types of data—meaning it can look at pictures, listen to audio, and read text all at once.
- **Prompt Engineering:** The art and science of refining your prompts to get the exact, high-quality output you want from an AI.
- **Prompt:** The instruction, text, image, or code you feed into an AI system to tell it what to do.
- **RAG (Retrieval-Augmented Generation):** A technique that connects an AI to external, private databases. Instead of relying solely on its internal training, it fetches the correct data first and then generates an answer.
- **Token:** The basic unit of data processed by language models. Tokens can be whole words or parts of words. Roughly speaking, 1 token is about 4 characters or 0.75 words.

Sources: <https://www.ibm.com/think/topics/ai-model>; <https://www.coursera.org/resources/ai-terms>; <https://news.microsoft.com/source/features/ai/microsoft-source-10-ai-terms-everyone-should-know/>