

If you're using AI tools like ChatGPT to draft emails, quotes, or documents - this checklist takes 10 minutes and could save you from a serious privacy mistake. Tick each item you have in place. Any unticked items are risks worth addressing.

SECTION 1 - AI Tools You're Using

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|--------------------------|-----------------------------|---|
| <input type="checkbox"/> | AI tool inventory | I know which AI tools I use regularly - e.g. ChatGPT, Google Gemini, Microsoft Copilot, Grammarly. |
| <input type="checkbox"/> | Business vs personal | I don't use personal AI accounts for client work - or if I do, I understand what that means for data privacy. |
| <input type="checkbox"/> | Free vs paid tier | Free plans (e.g. ChatGPT free tier) may use your inputs to train their models. I know which tier I'm on. |
| <input type="checkbox"/> | Account security | My AI tool accounts have a strong, unique password and two-factor authentication enabled. |

SECTION 2 - What Information Goes Into AI Tools

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|--------------------------|---------------------------------|--|
| <input type="checkbox"/> | No full client names | I avoid pasting full client names, addresses, phone numbers, or email addresses into AI tools. |
| <input type="checkbox"/> | No financial information | I don't paste bank details, invoice amounts linked to named clients, or financial records into AI tools. |
| <input type="checkbox"/> | No sensitive information | Health, legal, or other sensitive client data never goes directly into a public AI tool. |
| <input type="checkbox"/> | Anonymise where possible | I replace real names with placeholders (e.g. 'Client A') when using AI to help with client documents. |
| <input type="checkbox"/> | File and photo awareness | Files or photos I upload to AI tools don't contain identifiable client info I didn't intend to share. |

SECTION 3 - Reviewing What AI Produces

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|--------------------------|----------------------------|---|
| <input type="checkbox"/> | Human review always | Every AI-drafted email, quote, or document is reviewed by me before it goes to a client. |
| <input type="checkbox"/> | Accuracy check | I check AI output for factual errors, wrong figures, and anything that doesn't sound right. |
| <input type="checkbox"/> | No auto-send | I never auto-send AI output. AI drafts, I approve and send. |
| <input type="checkbox"/> | Tone and brand | Drafts are edited to match my voice and style before I use them with clients. |

SECTION 4 - Your Client Data Obligations

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|--------------------------|---------------------------------|---|
| <input type="checkbox"/> | Privacy Act awareness | Australian Privacy Principles can apply to sole traders who handle personal information. |
| <input type="checkbox"/> | Client consent | I've considered whether clients would expect their information to be processed by AI tools. |
| <input type="checkbox"/> | Data retention | I clear AI chat history or use privacy mode - I don't leave client data sitting in AI tool history. |
| <input type="checkbox"/> | Professional obligations | If I work in a licensed profession, I've checked my professional body's guidance on AI tool use. |

SECTION 5 - If Something Goes Wrong

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|--------------------------|----------------------------|--|
| <input type="checkbox"/> | Breach reporting | I know I can report a suspected data breach to the Office of the Australian Information Commissioner (OAIC) at oaic.gov.au . |
| <input type="checkbox"/> | Client notification | If I accidentally share client info via an AI tool, I have a plan to notify the client promptly and honestly. |
| <input type="checkbox"/> | Exit plan | If an AI tool announces a breach or policy change I'm uncomfortable with, I know I can stop using it immediately. |
| <input type="checkbox"/> | Annual review | I review this policy annually or when I start using a new AI tool. Date reviewed:
_____ |

Important: This is practical guidance, not legal advice. If your work involves sensitive client data or regulated information, speak with a privacy or legal professional. Free guidance is also available from the OAIC at [oaic.gov.au](https://www.oaic.gov.au).

Want help setting this up properly?

Free Me Up AI builds safe, practical AI automation for Australian owner-operators. We handle the setup, the governance, and the ongoing support - so you can focus on the work that actually earns. Book a free 15-minute AI clarity call at freemeupai.com.au