INTELLIGENT CHOICE

Rule for using AI tools

What may be entered into an AI tool, and what may not (Standard Terms clause 8.4)

Version 1.1 | 29 October 2026 | Owner: Travis Shaw | Review: every 6 months | Printable blank copy

The rule in one line. Client personal information goes into an AI tool only if the tool's terms bar training on what we enter, it is secure, and the client has been told which tools we use. If any of the three is missing, the information stays out. De-identify first (replace names with roles). If you paste something you should not have, treat it as an incident the same day.

Before you enter anything, three tests

1. ☐ **No training**
   The tool's current terms say our inputs are not used to train its models. Check the paid or business setting, not the free one.
2. ☐ **Secure**
   Two-step sign-in is on. The account is ours alone. The tool is on the approved list below.
3. ☐ **Client told**
   The client has been told which tools we use, in the Phase Schedule or in writing.

What may go in

Level	Examples	Rule
Public or ours	Our own writing, public web pages, templates, ideas	Any approved tool.
Client business information	Process descriptions, system names, anonymised figures	Approved tool that passes the three tests. Remove names where practical.
Personal information	Names, emails, phone numbers, staff or customer details	Only if the three tests pass and the work needs it. De-identify first (use roles or codes) wherever you can.
Never	Health, financial account, ID or card numbers, passwords, keys, tax file numbers, anything a client marks confidential	Do not enter. Ever.

Our rules

1. ☐ **Client information goes only through Anthropic's commercial API**
   Never into the Claude app or any consumer plan, and never into a tool that is not on the list below.
2. ☐ **No feedback on client chats**
   Do not use thumbs up or down on any chat that contains client information. Feedback can be kept for up to 5 years.
3. ☐ **Website workflows**
   The AI step in the website workflows never receives a name or email address.
4. ☐ **New tools and recordings**
   A new tool (for example a meeting recorder) needs the AI privacy impact check first. No session is recorded without the client's written agreement.
5. ☐ **Personal use stays separate**
   AI tools used personally never receive business or client information.

Approved tools

Add a tool only after the AI privacy impact check. Record the date its terms were last checked.

Tool	Plan or setting	Training off?	Terms checked	Used for
		Choose		
		Choose		
		Choose		
		Choose		
		Choose		

Done by:

Date:

Next check: