INTELLIGENT CHOICE

# Privacy routine and register

Monthly, quarterly and six-monthly checks, and the log that proves they happened

Version 1.0 | 23 October 2026 | Owner: Travis Shaw | Review: every 6 months | Printable blank copy

**Put it on the calendar.** Monthly: first Monday. Quarterly: first Monday of January, April, July and October. Six-monthly: January and July. Record the date and initials in the log at the end. The log is the evidence if anyone ever asks. Untick the boxes at the start of each period.

## Monthly (15 minutes)

- ☐ Airtable: delete test (+N), duplicate and spam entries older than 7 days (Readiness Results, Chat Requests).
- ☐ n8n: look at failed runs for anything unusual, and confirm successful runs are not saved and the oldest run is no more than 14 days old (pruning is fixed by OpenHost).
- ☐ Any client engagement ended in the last 30 days? Delete or return its information (see the Client information record).

## Quarterly (45 minutes)

- ☐ Two-step sign-in is on for every account that holds personal information: hosting, n8n, Airtable, Google Workspace, mail, Anthropic, BoldSign, QuickBooks, Miro.
- ☐ Password manager in use. Devices encrypted, screen lock on, updates installed.
- ☐ Tokens and credentials: delete unused ones. Each remaining token matches its workflow (Data separation and access set-up).
- ☐ Who has access to each client's area? Remove anyone who no longer needs it.
- ☐ Provider table in the Privacy Policy section 8 is still right (providers, countries).
- ☐ Any incident this quarter? It is in the incident register, with the fix made.

## Six-monthly (2 hours)

- ☐ Read the Privacy Policy end to end against how we actually work. Update the date.
- ☐ Open each website form and read its notice. Test one unsubscribe (STOP) reply.
- ☐ Check the retention periods in the policy against what we do.
- ☐ Check the approved AI tools list: terms still bar training? Add the date.
- ☐ Check for law changes. The automated-decision transparency rules start on 10 December 2026. Send the policy to the lawyer if anything material changed.
- ☐ Review the incident register and note what to change.

## Log

| Date | Check | Initials | Notes or action taken |
|---|---|---|---|
| | Choose | | |
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