

APPROVED AI TOOL: _____

AI OWNER: _____

ESCALATION CONTACT: _____

DON'T paste this into consumer AI tools

- X** **PII** **Customer or employee PII**
Names, emails, SSNs, addresses, IDs.
- X** **\$** **Financial data**
Revenue, P&L, payroll, bank info, forecasts.
- X** **LEGAL** **Legal & contracts**
MSAs, NDAs, settlements, litigation notes.
- X** **CODE** **Proprietary code or IP**
Source code, algorithms, trade secrets.
- X** **NDA** **Anything under NDA**
If a partner shared it in confidence — out.
- X** **HEALTH** **Health / regulated data**
PHI, HIPAA, biometric, minors' data.
- X** **BADGE** **Internal HR records**
Reviews, comp bands, terminations, complaints.

DO this instead

- ✓** **PII** **Use approved enterprise AI**
Tools with a signed DPA and no-training clause.
- ✓** **\$** **Strip or mask first**
Replace real numbers with structure-only samples.
- ✓** **LEGAL** **Run legal review through counsel**
Use the firm's vetted AI workflow, not ChatGPT.
- ✓** **CODE** **Use a private, self-hosted model**
Or a vendor with an enterprise zero-retention SLA.
- ✓** **NDA** **Ask the source first**
Get written OK before any AI tool sees it.
- ✓** **HEALTH** **Use a HIPAA-compliant tool**
BAA in place, audit logs, access controls.
- ✓** **BADGE** **Aggregate, never individual**
Patterns and ranges — not named records.

QUICK TEST

"Would you email this to a stranger? If no, don't paste it into a public AI tool."

This is step 2 of the 30-day boring middle. Full playbook at uscdatal.com/blog/boring-middle

Need help getting your data AI-ready?

Book a 20-minute call → uscdatal.com/contact
Scan the QR code or visit the link above.

