AI-use policy for [firm name]

Owner's Eye™

One page. Fill in the blanks, sign it, and hand it to everyone who works here.

Owner of this policy: [name] · **Date:** [date] · **Next review:** [date]

1. Who it covers

Everyone who works for [firm name], including contractors and casual staff. It applies on work devices and personal ones, and on paid and free AI accounts.

2. The AI tools we use

We use [tool and plan, for example "ChatGPT Team"] and [tool and plan]. On each one, we've switched off the settings that let the company use our chats to train its AI or share them. [Name] checked the settings on [date].

Client work happens only on these accounts. Personal accounts stay out of it, because our settings only cover the accounts we pay for.

3. What you may put in

- Your own writing, notes and drafts.
- Information that's already public.
- Documents with every client detail taken out first.
- Made-up examples.

4. What stays out

- Client names, addresses, phone numbers and email addresses.
- Dates of birth, and licence, passport, tax or social security numbers.
- Bank, card and account numbers.
- Health, family and money details about any client.
- Passwords and login codes.
- Contracts, statements and letters that still carry any of the above.
- Anything a client told us in confidence.

5. Before you paste

Swap each client for a code, such as Client A or Client B. Keep the list that matches codes to clients on our own system. That list stays out of the AI too. If you're unsure whether something is safe, ask [name] before you paste it.

6. Who checks the output

A person reads everything the AI writes before it leaves this firm. The person who sends it owns it. Your name is on it, so the mistake is yours, whoever wrote the first draft. Check the facts, the numbers and the names, and check it says what we mean.

7. Write down what you checked

One line in the client file. What the AI did, who checked it, what they changed and why.

8. When something goes wrong

If you paste something from the list in section 4, tell [name] the same day. Reporting it is always safe. Before anyone talks to you about it, [owner's name] asks one question first. What was my 50%? Half of every slip belongs to whoever set up the job, so we fix the rule as well as the slip, and the new rule goes into this policy. It works for a good catch too, and the rule that helped goes in here as well.

9. Review

[Owner's name] reviews this policy every [3] months, and after any mistake.

Signed: _____ **Date:** _____

General guidance for a small firm to adapt. It isn't legal advice. Check the privacy and data laws that apply where your firm works and where your clients live. From Owner's Eye™, by Juan Jeffery, ownerseye.co.