



Using AI to Improve Profits and Efficiencies in Your Small Business

AI Essentials for Business Workshop Series Handout

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Safe Data Checklist

What to NEVER Put into Public AI Tools

Protecting your clients, your business, and your professional reputation

Safe Data Checklist

What to NEVER Put into Public AI Tools

CRITICAL REMINDER: Free public AI tools (ChatGPT Free, Claude Free, NotebookLM) should be treated as potentially accessible by others. NEVER input sensitive or confidential information into these tools. When in doubt, leave it out — or use a paid enterprise version with stronger privacy controls.

NEVER Share These with Public AI Tools:

Personal Identifiable Information (PII)

- ✗ Social Security numbers
- ✗ Tax ID numbers (EIN, ITIN)
- ✗ Driver's license numbers
- ✗ Passport numbers
- ✗ Birth dates combined with full names

Financial Information

- ✗ Credit card numbers
- ✗ Bank account numbers
- ✗ Routing numbers
- ✗ Payment processing credentials
- ✗ Detailed financial statements with specific figures

Medical & Health Information

- ✗ Medical records or patient data
- ✗ HIPAA-protected information
- ✗ Insurance claim details with patient names
- ✗ Prescription information
- ✗ Diagnosis or treatment details tied to individuals

Business Confidential Data

- ✗ Trade secrets or proprietary formulas
- ✗ Unreleased product plans or designs
- ✗ Client contact lists with full details
- ✗ Customer databases
- ✗ Pricing strategies for competitive bids
- ✗ Non-public financial performance data
- ✗ Employee salary information

Legal & Contractual Information

- ✗ Anything marked confidential or under NDA
- ✗ Pending litigation details
- ✗ Attorney-client privileged communications
- ✗ Contract negotiations in progress
- ✗ Settlement terms or conditions

Access Credentials

- ✗ Passwords or login credentials
- ✗ API keys or authentication tokens
- ✗ Security questions and answers
- ✗ Server access information

Safe Alternatives: What You CAN Do

Anonymize Before Sharing

Replace specific details with generic placeholders:

- ✓ “Customer A” instead of “John Smith at Acme Corp”
- ✓ “Our main supplier” instead of specific company names
- ✓ “\$XX,XXX” instead of exact dollar amounts for sensitive data
- ✓ “Department 1, Department 2” instead of specific team names

Generalize the Context

Ask about the general situation without specific identifiers:

- ✓ Draft an email explaining a shipping delay to a commercial client
- ✓ Summarize insurance regulation changes (without client names)
- ✓ Create a job posting for an HVAC tech (without applicant info)

Use Hypothetical Examples

Frame requests as scenarios rather than real situations:

- ✓ If a customer complained about late delivery, how would you respond?
- ✓ Draft a template for explaining billing changes to patients
- ✓ What should be included in a construction change order?

The Simple Rule of Thumb

Ask yourself: “Would I email this information to a stranger?”

If the answer is NO, don’t put it in a public AI tool.

If you wouldn’t post it publicly, don’t input it into public AI.

Free vs. Enterprise AI Tools

Free Public Tools (ChatGPT Free, Claude Free, NotebookLM):

- ✓ Assume your data may be used for training or improvement
- ✓ Treat as potentially accessible by others
- ✓ Best for: Templates, general knowledge, non-sensitive tasks

Paid Enterprise Versions (ChatGPT Team/Enterprise, Claude Pro/Team):

- ✓ Stronger privacy protections and data handling policies
- ✓ Data typically not used for model training
- ✓ Better for: Business use with moderately sensitive data
- ✓ Still follow the Safe Data Checklist for highly sensitive information

Your Responsibility

AI tools are powerful assistants, but YOU are responsible for:

- ✓ Protecting client confidentiality
- ✓ Complying with privacy regulations (HIPAA, GDPR, etc.)
- ✓ Honoring non-disclosure agreements
- ✓ Safeguarding business-critical information
- ✓ Reviewing all AI outputs before using them

When in doubt, leave it out. Your professional reputation and legal obligations depend on it.

Legal Disclaimer

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