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AI use policy

[Business name] · Version 1.0 · Approved by [role] on [date] · Next review [date]

> Template from COREWEST (corewest.com.au/resources/ai-tools-at-work). Replace everything in [square brackets]. This is a starting point, not legal advice.

1. Why we have this policy

AI tools such as ChatGPT, Claude, Gemini and Copilot can save time. They can also expose client, staff and business information if used carelessly. This policy explains which tools we use and what can go into them.

2. Who it covers

Everyone who works for [Business name], including staff, contractors and volunteers, on any device used for our work.

3. Approved tools

Tool	Plan	Signed in with	Approved for
[e.g. Microsoft Copilot Chat]	[work plan]	[work account]	[drafting, summaries]
[ ]	[ ]	[ ]	[ ]

Only tools in this table may be used for work. Ask [role] before trying a new one. Personal or free accounts must not be used for work information.

4. What can go into an AI tool

- Public information, such as our website or published documents
- Drafts and wording with no client, staff or financial details
- General questions, such as explaining a formula or a term

5. What must never go into an AI tool

- Personal information about clients, patients or staff, including names, contact details and health information
- Tax file numbers, Medicare numbers, bank or card details
- Passwords, security codes or anything from a login screen
- Confidential client files, advice, contracts or pricing
- Anything we are bound to keep confidential by law or agreement

The Office of the Australian Information Commissioner advises organisations not to enter personal information, and especially sensitive information, into publicly available AI tools.

6. Checking what comes out

- A person checks facts, figures, names and advice before anything is sent or relied on
- AI output is never sent to a client without review
- We say when AI was used if a client or regulator asks

7. Mistakes and incidents

If something on the “never” list goes into an AI tool, tell [role] the same day. We will work out what was shared, delete the chat where possible, and decide whether anyone needs to be told, including under the Notifiable Data Breaches scheme.

8. Review

AI vendors change their terms often. [Role] reviews this policy and the approved tools at least every [6/12] months.

Acknowledgement

I have read this policy and will follow it.

Name _____ Signature _____ Date _____

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