

AI STAFF QUICK CHECK

Two-page desk guide for safer day-to-day AI use and incident escalation

BEFORE YOU USE AI

GO	CHECK	STOP
Lower risk, approved use. Proceed with normal review.	Clarification, approval or stronger controls are needed.	Do not proceed with real data until specifically authorised.

Five quick checks

	Check
1 DATA	What information are you using?
2 PURPOSE	What are you trying to achieve?
3 TOOL	Is the exact tool/workspace approved?
4 ACTION	Will the AI only draft/read, or can it send/post/change something?
5 REVIEW	Who checks the output and what needs to be recorded?

STOP IMMEDIATELY IF

You are about to enter passwords, recovery codes or authentication secrets; use an unapproved personal/public AI service for confidential data; or let AI make a material external/financial action without authorised controls.

Typical signals

Example	Signal
Public research with no confidential data	GO - verify source and date.
Generic formula / fictional drafting	GO - normal review.
Client/customer-specific drafting	CHECK - approved tool/data and human review.
Pseudonymised but recognisable information	CHECK - still potentially personal/confidential.
Raw payroll, bank, tax or ID information in a public/unapproved tool	STOP.
AI sends external messages, posts entries or changes records	CHECK / STOP - needs explicit action approval.

IF SOMETHING GOES WRONG

Do not panic. Do not hide it. Do not make it wider.

	Action
1 STOP	Stop further sharing/activity and revoke live exposure if safe to do so.
2 PRESERVE	Keep the conversation/file ID, time, account, product and visible settings. Do not erase key evidence.
3 ESCALATE	Contact [AI owner / privacy lead / manager / IT] immediately.
4 RECORD	Write down what left, where it went, who could access it and what happened next.
5 SUPPLIER	Submit a deletion/incident request where appropriate and keep the ticket/evidence.
6 DO NOT PROMISE	Do not tell a client/customer that data is deleted unless the supplier position is actually confirmed.

ESCALATION CONTACTS

AI owner: [name / contact]
Privacy / DPO: [name / contact]
IT / security: [name / contact]
Manager / partner / director: [name / contact]

Remember

- AI can be useful and still be wrong.
- A familiar brand does not mean every product, account or use is approved.
- Pseudonymised does not automatically mean anonymous.
- More AI permissions mean more control is required.
- When in doubt, choose CHECK and ask before using real data.

TEMPLATE STATUS

Adapt this page to your real approved tools, escalation contacts and procedures before issuing it to staff.