



IT

SENSITIVE DISCUSSION WITH AN AI TOOL?

Reduce the data before relying on Temporary Chat

CLASSIFY
THE INFO

CHECK
THE POLICY

REMOVE
IDENTIFIERS

USE APPROVED
ACCOUNT

ENABLE
TEMP CHAT

CHECK
THE OUTPUT

TEMPORARY DOES NOT MEAN IMMEDIATELY DELETED OR SUITABLE FOR EVERY TYPE OF DATA

CLASSIFY

- ☐ Is this information public, internal, confidential or restricted?
- ☐ Does it identify a real person?
- ☐ Is it covered by a contract, regulation or legal privilege?

APPROVE

- ☐ Is the AI service approved for this type of information?
- ☐ Is this a business account rather than a personal account?
- ☐ Are connected tools approved?

REDUCE

- ☐ Remove names
- ☐ Remove addresses and account numbers
- ☐ Remove unnecessary dates and exact figures
- ☐ Replace identifiers with labels (Customer A, Employee B)

FILES

- ☐ Remove document comments and tracked changes
- ☐ Check for hidden worksheets
- ☐ Remove metadata (author, organisation, revision history)
- ☐ Provide only the relevant section, not the full file

NEVER INCLUDE

- ☐ Passwords or one-time codes
- ☐ Authentication tokens or API keys
- ☐ Banking credentials
- ☐ Private encryption keys
- ☐ Recovery codes
- ☐ Full payment-card information

TEMPORARY CHAT

- ☐ Enable Temporary Chat before entering information
- ☐ Confirm the Temporary indicator is visible
- ☐ Remember: OpenAI may retain for up to 30 days
- ☐ Custom Instructions may still apply
- ☐ Do not invoke connected tools unnecessarily

REVIEW

- ☐ Check the output before relying on it
- ☐ Do not treat it as legal or professional advice
- ☐ Report any accidental disclosure
- ☐ Save only what is needed

WARNING SIGNS

- ☐ Information identifies a real person
- ☐ Contract prohibits external processing
- ☐ Live cyber incident or legal privilege involved
- ☐ User is on a personal rather than business account
- ☐ No organisational AI policy in place

TEMPORARY CHAT REDUCES PERSISTENCE — IT DOES NOT MAKE PROHIBITED OR CONFIDENTIAL INFORMATION SAFE TO DISCLOSE.



