

CHECKLIST · AI AT WORK

Can you put client information into ChatGPT? What the privacy rules say

Published 27 September 2026. Read the full story, sources and any updates at digitaladvisors.com.au/journal/client-information-chatgpt-privacy/

-
- ☐ **Check whether the Privacy Act covers you.** Confirm turnover against the \$3 million threshold, and check the OAIC's list of businesses covered regardless of size, such as health service providers.
 - ☐ **List the AI tools staff actually use.** Note whether each is a personal free account or a business plan your organisation controls.
 - ☐ **Read each tool's data terms and settings.** Check whether what staff type in can be used to train the provider's models, and switch that off where you can.
 - ☐ **Move client work to business accounts you control.** Keep customer and patient details out of personal chatbot accounts.
 - ☐ **Keep sensitive information out of AI tools without consent.** That includes health information, race and religious beliefs.
 - ☐ **Paste only the personal information the task needs.** Leave out client details the AI tool doesn't need to do the job.
 - ☐ **Have a person check AI output about clients.** Correct errors before anything is saved to a record or sent.
 - ☐ **Update your privacy policy if you use AI with personal information.** Say how you use it, and label any customer-facing chatbot as a chatbot.
-